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Mexican American School Leadership in South Texas: Toward a Critical Race Analysis of School Finance Policy

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Mexican American School Leadership in South Texas:

Toward a Critical Race Analysis of School Finance Policy

by

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Dedication

María Guadalupe Alemán
1946 – 2002

Mom,
you inspire me to
practice patience, exude class,
cherish my family and believe in humanity.
Your genuine goodness, your contagious smile,
I strive to emulate.

Sonya María Alemán

Wife, Friend, Lover,
you inspire me to
be a better person, smile daily,
duplicate your compassion and fulfill my dreams.
With you,
I aspire to dance with for the rest of our lives.

Acknowledgements

Two giants in my life died during the four years I attended classes and worked on my dissertation. José Ybarra Alemán, my paternal grandfather, emigrated from Mexico as a young boy, became a naturalized citizen in 1988 and promptly voted in the presidential election. I will miss our political debates and discussions of the big, upcoming boxing match. Although he attended little formal schooling, he was truly one of the most intellectual and intelligent persons I've ever known. A year-and-two months prior to his death, my mother, María Guadalupe Alemán passed away peacefully surrounded by her children, husband and sisters. She was the classiest person on earth. She was good. She was genuine. She had the most beautiful and warm smile. She profoundly inspired me. I will never cease to cry for her. I will try to "be patient," to "smile more," to "stop piddling" and to enjoy the important things – my family, my children, and my partner – the way she did throughout her life.

I met Dr. Jay D. Scribner in the spring of 1999 when I began to think seriously about giving a shot at the Ph.D. An email began my friendship with and admiration for Dr. Scribner. He met with me that week, listened to my ideas and since then has been a source of support and encouragement. He is one of the big reasons I was able to accomplish my goals. My dissertation committee members are experts, leaders and visionaries in the field and areas of education, policy, politics and critical thought. Angela Valenzuela has been a model of activism, a mentor and a friend, Jim Scheurich has pushed me to be reflective and critical, Laurence Parker has inspired me to research that which is important to me and socially just, and Pedro Reyes has represented the type of

leadership and accomplishment that I aspire to attain. I thank them all for their guidance and support.

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I am blessed to come from a large family. My parents have a combined eighteen siblings and along with their spouses, each taught me something about myself or about who I wanted to be. Two in particular are special to me. Tía Loli gave me a home away from home when I first left for college. As she did then, she continues to leave the door open for me in more ways than one. Her compassion, benevolence and spirituality continue to aid me when I most need it. I remember visiting my Tío Joe at the car dealership he owned in McAllen when I was a young boy. He was a polished, educated and charming politician and businessman and modeled a sense of decency that I admired. The first of my father's family to attend college, our visit was never complete until he looked me in the eye and asked where I wanted to attend college. His optimism and high expectations are what I carry with me to this day.

My second family, father-in-law, Homer Mora, sisters-in-law Xochitl and Sylvia, brother-in-law, Sergio, have supported Sonya and I in our first nine years together, providing the support only real family could provide. In all the years that I have known her, my mother-in-law, María Florencia Sobrevilla, has been especially giving, loving and caring. She traveled to New York when our son was born, spent time with the kids during summer and spring breaks in Austin, and already has a place to stay in Salt Lake. Her strong spiritual foundation has benefited our family.

Paternal grandparents, José Ybarra and Manuela Tamez Alemán, and maternal grandparents, Jesus "Chuy" and Genoveva Treviño Alemán provided a historical inspiration and solid foundation of family, work ethic and hope. None had much formal education but the knowledge they passed down and the sacrifices they made for their family is something that has inspired and motivated me to this day.

Three very special people in my life are my siblings, Jacob, Jason, and Tina. They withstood the wrath of a perfectionist, critically-oriented (the best way I can say it) oldest brother and never wavered in their support of me. I am proud to be their brother and hope they can one day forgive my transgressions.

Henry and Lupe Alemán provided a safe home where I could learn to be me. It was filled with love for family and each other, commitment, hard work, laughter, sports, good food, dancing and togetherness. They took us to see Mickey Mouse and Mount Vernon, to church and to the Valley, taught us by lecturing but mostly by example, and never made me feel like I wasn't the most loved in the world. I aspire to raising my kids and loving my partner in the same manner that they did for over thirty years. Words cannot express the gratitude I have for them and what they did for me.

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Mexican American School Leadership in South Texas: Toward a Critical Race Analysis of School Finance Policy

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Supervisor: Jay D. Scribner

The purpose of this study was to understand the nature of the discourse utilized by Mexican American educational leaders in the debate over school finance reform in Texas. After thirty years of struggle toward equity in funding, legislative reform proposals and litigation to overturn the current system are now under consideration. This study examined how educational leaders privately situate their district's financial health in the current system. It also delineates Mexican American school leadership public discourse in this context.

Because education policy analysis and the politics of education are rarely examined through a critical race framework (López, 2003; Parker, 2003, pg. 154), a methodology utilizing this perspective was employed. A Latino Critical (LatCrit) Theory

framework was utilized to further investigate how racial identity, social justice goals and political organization were addressed by the Mexican American participants (Haney López, 1998; Nuñez, 1999). Interviews with school leadership, examination of legislative testimony and an analysis of state school finance policy were the primary methods of collecting data.

The research suggests that school leadership discourse is informed by personal backgrounds in struggle, perseverance and work ethic. Political organization and advocacy is identified as an essential element of school leaders' responsibilities, however, concepts of race and racism are defined narrowly and deemed ineffective in the political discourse. Although the educational leaders view school finance as unfair, inequitable, and insufficient, they deny the institutional role that racism plays. Whereas they negate the racial hierarchy instituted by the school finance system, they practice a racial, coalitional process of political participation and organization.

This research further develops scholarship in educational administration, politics of education and education policy analysis. It continues on the emerging critical race policy analysis track laid by Parker (2003), heeds López' (2003) call to introduce race analysis in the politics of education field, and builds upon the burgeoning LatCrit scholarship conducted by Solórzano & Yosso (2001). This research has implications for training school leadership in areas of critical race thought, policy analysis and politics of education. It directly connects to social justice, social activism and equity issues affecting Mexican American and marginalized communities of color.

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PROLOGUE

Finding My Purpose

Similar to many graduate students, the dissertation is the biggest and most intense research and writing project that I have undertaken in my academic and professional life. Beginning my graduate studies I knew that I wanted to study Mexican Americans,[1] politics in education, education policy, race and racism. My previous training taught me to distance myself from my work, both scholarly and professionally, so my progression towards interpretive, qualitative research was gradual. For my dissertation, I decided to try something new and took a leap of faith into what felt right. I became a critical researcher, delving into one of the most serious of social problems – how the absence of a critical discourse of racism in policy and politics negatively affects and disadvantages marginalized groups in the policy-making process. Applying this perspective to my study of the current school finance debate in Texas provided the springboard for my future research agenda. However, a personal story and life-altering event provided the impetus for the merging of my mission, rationale and goals of the study.

Many national events and personal high and low points occurred during my years of graduate study – my son's kindergarten year of school, the September 11th attacks, my daughter's first birthday, the birth of my third child, and the never-ending 2000 presidential election. However, the most difficult and heartbreaking event was the death of my mother in January 2002 in the second year of my doctoral program. I feel cheated by mom's death. Not only because my children will never be able to experience the

[1] I will use the terms Mexican American, Mexican, Mexicana/o, and Chicana/o interchangeably. I will use the term Latina/o when speaking of the pan-ethnic group including persons of Central and South American descent and those from the Caribbean, both immigrant and native, U.S.-born segments of society.

entirety of the love and affection she had for them, but also because I will not be able to simply pick up the phone and be calmed by her patient demeanor and reassuring words. I feel robbed of my history, my children's history and the incredible history of a shy Mexican American student from Driscoll, Texas. I undertook this study to regain my identity and to prevent our history from being lost forever. It has sent me forth on my personal journey and laid the foundation for a career grounded in social justice and liberatory inquiry of the segments of society that are marginalized, specifically Mexican American communities and the Chicano school children that are so often left behind (Valencia, 2002b; Valenzuela, 1999).

Discrimination and Political Organization in South Texas

A convergence of ideas, personal experience and future research aspirations fused in the spring of 2003 as I watched a documentary titled, *Justice for My People: The Dr. Hector P. Garcia Story* (Felts & Pope, 2003). The documentary celebrated the life and career of Dr. Hector P. Garcia, the founder and longtime leader of the American G.I. Form (AGIF), a civil rights organization formed initially to fight for the services and benefits of Mexican American veterans of World War II. Upon returning from combat, Mexican American veterans encountered the same discrimination and racial prejudice they had experienced prior to the war. Many valiantly sacrificed their youth, innocence and their lives for a belief in the democratic ideals that this nation represents.[2] Upon

[2] Some estimates put the number of Mexican Americans in the armed forces during World War II at between 375,000 and 500,000. Mexican Americans are termed by some as the "most decorated ethnic group of World War II" – a distinction given to them no doubt by fact that Mexican Americans received more Congressional Medals of Honor, Silver Stars, and Bronze Stars than any other ethnic group (San Miguel, 1987). Allsup (1982, pg. 16) notes that during World War II, "Most Mexican American males were eligible for conscription and approximately 500,000 Spanish-surnamed persons served in the armed forces. This disproportionately large number was manifested in the combat divisions where Mexican Americans had the highest ethnic group representation in the country."

return, they were prevented from receiving G.I. bill benefits, from securing hospital beds at military hospitals, and from burial in a military cemetery designated as “white only” (Allsup, 1982, pgs. 34-49; Felts & Pope, 2003). Mexican American army soldiers, marines, sailors and airman played an instrumental role in defeating a regime bent on destroying non-Aryan peoples, and once home their focus shifted to gaining some semblance of dignity and full citizenship afforded to them by the Constitution of the United States. Dr. Garcia led many of these efforts.

As noted by San Miguel (1982), Mexican American organizations, such as the AGIF, played a chief role in eradicating adverse classification and segregation of students based solely on their ethnicity, race and Spanish language ability. Early years of court action supported by the AGIF were documented in the Garcia documentary. Court cases fighting for desegregation of schools and unfair treatment of Mexican American school children, the dismal state of health care among South Texas migrant families, and unfair treatment of service men returning from conflicts in Europe, South Pacific Asia, and Korea were areas that AGIF and its leader, Dr. Garcia, concentrated their legislative, judicial and social justice efforts (Allsup, 1982; Felts & Pope, 2003; García, 2000; San Miguel, 1987).

Post-war South Texas was not much different from the Depression years of the late 1920s and 1930s. The overwhelming majority of Mexicanos in Texas in the 1950s were U.S. citizens; however they did not enjoy the same rights that white citizens did. Unemployment was exceedingly high, the median income of migrant families was less than $400 a year, and the majority of Mexican American farmworkers were not represented by a national or regional union (Allsup, 1982, pg. 21). Life in South Texas

schools was equally dismal and discriminatory. Allsup (1982, pgs. 23-25) points out that the high illiteracy rates, low graduation rates, and minimal years of schooling further disadvantaged Mexican Americans for future employment opportunities.

This is the era from which my parent's came. My mother was born, raised and attended schools up until the eighth grade in Driscoll, a small South Texas community approximately twenty-five miles southwest of Corpus Christi. Her family's life was typical of the many migrant farmworking families in the post-war, agricultural economy of South Texas. They struggled to make ends meet, worked primarily in the cotton fields, and attended segregated school houses. My mother went on to graduate from high school at age twenty along with two of her sisters, one of whom was a year her senior, the other a year her junior.

At the age of about thirteen, I remember looking through one of her high school yearbooks and asking questions about her senior year. She was the first Mexicana to be voted homecoming queen at Bishop High School, a slightly larger farming community nine miles to the south. I was enchanted by her story about how she won and was inspired by the organization and cohesiveness of the Mexican American students that made it their mission to vote her that year's queen. However if not for the absence of one teacher, who also happened to be responsible for "counting" the ballots, she may not have ever won. The teacher had always been responsible for this duty and not coincidentally, no Mexican American student had ever won despite outnumbering their white counterparts. My mom always happily recounted the look on the face of the teacher as she learned the results upon her return, disgusted by the fact that there was nothing she could do to change the outcome. I asked at what age she graduated and why she

graduated with two sisters not of the same age. Mom would then take me back to her early school years in Driscoll.

Prior to being bused to Bishop to finish her high school studies, she completed her K-8 education at the small district in Driscoll. She explained the tough times vividly, describing the harsh treatment experienced for speaking in Spanish, how she felt embarrassed to be the tallest child in class or being made to feel foolish for attempting to answer a question. Yet it was her graduation age of twenty that intrigued me the most. Why did you graduate at twenty? Why did you graduate at the same time as Tía Mary and Tía Loli if one is older than you and the other younger? Were you not smart enough to graduate at eighteen? At one point, she told me how she participated in a court case while in first grade, how she testified in front of a judge, and how the district was found to be in violation of retaining Mexican American students intentionally. I always remembered that story and felt a sense of pride that my mother had been brave enough to endure this outright discrimination in schooling. Unfortunately, it was the only time we talked about it. Cancer would take her from us before I would have the opportunity to ask her about it again.

A Defining Driscoll Moment

Carl Allsup, a historian who has done extensive research on the AGIF and its founder Dr. Garcia, was the first to mention Hernandez vs. Driscoll Consolidated ISD (1957)[3] in the documentary. As described by Allsup, it was one of the first major cases to be won by AGIF attorneys. Allsup (1982) describes the case as

[3] Case files, court transcripts, legal briefs and court opinions are located at the National Archives and Records Administration (NARA)-Southwest Regional office in Fort Worth, Texas.

> The culminating event of these ten years of persistent, sometimes frustrating, but always important confrontations…the case represented the final attempt of the Texas school system to cling to its 'language' rationale in order to maintain legal segregation of Mexican Americans. (pg. 94)

Mexican American organizations, AGIF in particular, had formulated a strategy to systematically attack the districts one by one. The Hernandez case would be the point at which the last gate would be opened in the levy, providing a rush of water needed downstream by an unproven civil rights organization (Allsup, 1982).

In September 1955, when my mother was eight years of age, Dr. Garcia filed a complaint with the State Superintendent of Public Instruction for the state of Texas. In it, he described the institutionalized segregation practices employed by Driscoll CISD and its failure to meet the standard of the law as ruled under Delgado vs. Bastrop Independent School District (1948).[4] In Delgado case, the court ruled that school districts that arbitrarily segregated Mexican American students were doing so illegally and in a discriminatory manner; however, a school district was allowed to segregate first-grade Mexican American students if they were deemed to have English-language deficiencies (San Miguel & Valencia, 1998, pg. 376). Knowing that Driscoll CISD did not test English-proficiency prior to assigning classroom placement among their 1st graders, AGIF leadership sought to use Driscoll CISD as a means to overturn the segregation practices of many Texas school districts. In what is termed "the first post-Brown school desegregation case to be brought on behalf of Mexican Americans" (Wilson, 2003, pg.

[4] The case is located at No. 338, Civil District Court of the U.S., Western District of Texas, Minerva Delgado, et al. vs. Bastrop Independent School District of Bastrop County, et al., Final Judgement, June 15, 1948, HPG.

166), Herminio Hernandez along with other parents, two of whom were my grandparents, would seek to challenge the racist and discriminatory practices of Driscoll CISD (Allsup, 1982; Wilson, 2003).

The Driscoll CISD placed Mexican American students in a "beginner's" first grade class for the first scholastic year, after which they were "promoted" to the "low first" in their second year. The students were then moved on to the "high first" in the third year and finally to a segregated second grade in the fourth year. Dr. Garcia argued that the children were never tested for English competency; rather they were relegated to segregated, unequal classrooms based on their Spanish surname. The district's case did not meet judicial muster when students were called to the stand to testify in English. The presiding judge, U.S. District Court Judge James Allred, emphasized how the district's case fell apart when one child who could not speak a word of Spanish testified and demonstrated the district's violation of the Delgado case (Allsup, 1982, pg. 95). My mother was one of the many students called upon to answer questions in English in the court case.

The mention of Driscoll in the documentary sparked the "a-ha" moment I had waited for my entire life. This moment confirmed what I had long intuited – that Mexican American people were courageous, that our history demonstrated perseverance, and that my identity was directly related to those brave souls who came before me. It took me back to the time when I was filled with pride over my mom's accomplishment at thirteen and I was able to merge the issues and ideas of graduate work into a mission for my life and a focus for this study. My mother's participation in this historic trial was up until this point a footnote in history. It was relegated to about four pages of text in the Allsup

(1982) book, a few pages in the Garcia (2000) book and three minutes in the Felts and Pope (2003) documentary. Why wasn't this moment used as a predominant teaching moment in my life? Why hadn't this history and a discussion of the overt and institutional racism that existed in schools play a more central role in my upbringing? Why didn't public education in my formative years include the history of this and other accomplishments made by Mexican American citizens? Why are we still not teaching this to our children or instilling in them a sense of analysis that will allow them to look at our history and the current incidence of poverty, mis-education and under-employment in the Mexican American community more critically?

Toward a Latino Critical Race Framework

Both my parents were migrant farmworkers, having experienced racism and discrimination firsthand for most of their lives. They were raised to be active American citizens and they were also strong in their opinions about fairness, equality and pride of our heritage. As is the case in many Mexican American families, they were very proud of the fact that they were migrant farmworkers. There was a strong sense of family pride, the importance of *educacíon*, love of our elders and respect for their struggle (Delgado Bernal, 2001; Valenzuela, 1999; Villenas & Deyhle, 1999). A hesitance to talk about race and racism persists among many Mexican Americans, even those with strong historical and culturally-informed perspectives. I have broached the subject personally with some of my contemporaries, accomplished and "educated" Mexican Americans and in most cases have been discouraged from talking about race as if its is something we should not do. Similar to the research conducted by critical race theorists, a color-blind,

meritocratic society and silencing communities of color was being advocated (Bell, 1995; Crenshaw, Gotanda, Peller, & Thomas, 1995; Delgado & Stefancic, 2001).

Mexican American communities, teachers, students, parents and leaders should teach the history of discrimination and racism in our schooling, both overt and institutional. In the introduction of Scheurich's (2002) *Anti-Racist Scholarship*, he states, "this book may have some uses for scholars of color, for a person of color to be an anti-racist is a very different enterprise of which I have little knowledge, experience, or understanding – and certainly no advice," (pg. 1). He describes how white racists must understand and situate themselves within their own white racism if they are to do anti-racist scholarship. In much the same way that Scheurich advocates, I believe Mexican Americans should dialogue about our common history and discuss how the problems facing our community were instituted, have evolved, and how race and racism (or lack of racial analysis) lie at their foundation. It is a valuable lesson that empowers Mexican American leaders and educates and makes better citizens of all students, teachers and parents. Additionally, racial analysis can also act as a unifying force for the community at large and encourage a more socially just populace (Nuñez, 1999). The fact that my mother took the stand and testified in a courtroom dominated by white men at the age of 9 took tremendous courage and confidence. The tale of her bravery as well as the struggle and perseverance of Mexican American and Latino families should be a primary tool in educating children, informing adult citizens and organizing a political movement. Dialoguing about race has more specific benefits for Mexicanos that have not yet been realized. Mainly, it will allow us to define ourselves as Mexican Americans and Latinos (Nuñez, 1999; Valdes, 1997), to appreciate and respect our history (Delgado Bernal,

2002; Villalpando, in press), analyze current policy negatively affecting our schoolchildren (Valencia, 2002b; Valenzuela, 1999, 2002) and organize our communities to fulfill social justice initiatives (Nuñez, 1999; Valdes, 1997).

My understanding of Mexican American history today is better than it was as a thirteen-year-old. I realize that race and racism permeates every fabric of our society's organizations, structures and institutions (Bell, 1992; Crenshaw et al., 1995; Delgado Bernal, 2002; Delgado & Stefancic, 2001; Ladsen-Billings, 1998; Ladsen-Billings & Tate, 1997; López, 2003; López & Parker, 2003; Parker, 1998; Parker & Lynn, 2002; Trucious-Haynes, 2001). Texas' school finance policy and the system that distributes funding exemplify an institutional structure that deserves to be examined critically regarding its racial hierarchy and discriminatory practice. Latino schoolchildren have been disadvantaged by this education policy since the inception of the state (Cardenas, 1997; Valencia, 2002b). Although numerous efforts since the early 1990s have successfully reformed the system by implementing a more equitable system of funding schools, state-sanctioned inequity continues to exist. Even with this, the neo-conservative legislative leadership is now threatening to return to an era where blatant inequity was pervasive. Among other political, social, and research efforts, a more comprehensive and critical assessment of school finance policy is warranted. Effectively communicating and promoting a Latino critical race framework of political participation for Mexican American educational leaders is my mission.

Mom continues to inspire me even today. I'm more proud of her than ever.

CHAPTER I: BACKGROUND

Introduction

Examples of blatant racism and gross inequity are ubiquitous throughout the history of school funding in Texas. The current system of school finance, although much improved, exemplifies remnants of its racist past. Put simply, the core of school funding requires school districts to raise local funds and the state legislature to appropriate state funds to supplement local funds. As in the past, most property-poor districts predominantly consist of students of color while property-wealthy districts predominantly consist of white students. Complicating a shift to a more equitable system is one of the most historically conservative, white-dominated institutions – the Texas Legislature.

Numerous litigation efforts filed against the state did not inspire legislative and political reform in the funding of schools. The state political leadership refused to infuse the system with the necessary funds or to voluntarily institute measures to ensure some form of equity. After arduous litigation, tireless social action and lengthy legislative battles provoked by poor, predominantly-Mexican American school districts, an "equalized" system was finally achieved in 1995. The new system provided districts with approximately equal access to combined state and local funds and ensured comparable tax rates. It also for the first time in the history of the state provided school districts with state funds for facilities.

During the first week of the 78th regular session of the Texas Legislature in 2003, the House Public Education committee voted to eliminate the Texas school finance system known as "Robin Hood." The Republican committee chairman presided over a two-hour meeting in which his bill to eliminate the school finance system was the sole

agenda item. Little public testimony was taken and only one representative of minority school districts testified on behalf of the current system of finance. The bill was approved by the committee but was subsequently defeated by the overall House. A substitute bill was finally passed in both chambers of the legislature and signed by the governor in which the current school finance system will be "sunset" by September 2005 if a new system is approved by the political leadership prior to that date. In an effort to devise a new system, the legislative leadership has formed two select committees to study the issue and propose solutions. In addition, the governor has called a special legislative session for April 2004 to consider the school finance policy solutions and create this new school finance system.

This dissertation examines how Mexican American school leadership discourses and advocates for their Mexican American constituency in the school finance debate of Texas. What is the nature of the policy and political discourse utilized by Mexican American school leadership? In what ways do they use concepts of race and racism in their discourse? The focus of this study will be on critically examining how Mexican American school leaders discourse school finance policy, and how this discourse intersects with their understanding of race, racism and politics.

Background

Education policy has historically been utilized to marginalize children of color (Acuña, 1988; Allsup, 1982; Cardenas, 1997; San Miguel, 1982, 1987; San Miguel & Valencia, 1998; Spring, 1997; Takaki, 2000). An inherent danger to democracy and social justice exists when policymakers, education leaders and school administrators fail to critically analyze the effects of education policy on the most vulnerable of school

children. The history of the U.S. would not be complete without a full and accurate analysis of the slave trade, the massacre of Native Americans, the imprisonment of U.S. citizens of Japanese descent, and the colonization and subjugation of Mexican American people in the Southwest. In much the same way, an analysis of education policy, the history of its formation, and its effects would not be complete without examining how marginalized communities have been affected and how structures and institutions further solidified the racial hierarchy that currently exists. It is from a non-critical race framework that education policy is created and politics is practiced (Bailey, Frost, Wood, & Marsh, 1962; Cibulka, 1994; Easton, 1965; Fowler, 2000; Iannaccone, 1975; López, 2003; Malen, 1995).

Over the last three years I have engaged in informal conversations with a variety of people about their understanding of race and politics and their influence on education policy. Typically, someone would ask me how graduate school was going and what I was studying. Eager to discuss my interests in school finance policy, political strategy and my latest reading on the topics of critical race, assimilation or politics of education theory, I would provoke conversation by introducing Bell's (1992) *Faces at the Bottom of the Well*, Kozol's (1991) *Savage Inequalities*, or Takaki's (2000) *Iron Cages*. Most of the time, the first reaction was one of being caught off guard at my broaching the subject of race in modern America or the history of racism towards people of color at a family function or friend's birthday party. I would then be asked why I would want to "rock the boat" and whether I was "really going to school to study this stuff." Although discouraged by this seemingly naïve notion of an equal and just society, it provoked me

to be more introspective about the inability, ignorance or unwillingness to understand the predominant role that race and racism play in schooling and education policy-making.

My understanding, however, was further complicated by the fact that many, if not all of the conversations, were with Mexican American, upwardly mobile, college-educated and professional colleagues, friends and family members. These persons were beneficiaries of affirmative action programs and products of parental and familial struggle. Among them were teachers, business executives, health care professionals, attorneys, and information technology consultants. They represented the left, right and center of the political spectrum. Among them were culturally-aware Chicana/os and Latina/os and assimilated "Hispanics." They epitomize the Mexican American community's future leadership.

These conversations further inspired my decision to study how perceptions of race and racism intersect with politics and policy. How could my peers, friends and relatives consistently and unequivocally deny the predominant role that race and racism play in determining education policy? Our background and personal histories were similar. Why was my frame of reference so different from theirs? Some in the LatCrit Theory field, an outgrowth of the Critical Race Theory (CRT) movement that emphasizes the understanding of racialization of Latinos within a U.S. context (Parker, 2003), contend that either "we often are seduced into thinking we are White" (Trucious-Haynes, 2001) or fail to consider Latinos place within the racial hierarchy, a fact made difficult by the white-black dichotomy that dominates racial discourse in the U.S. (Nuñez, 1999). Nuñez (1999) states that Latinos must develop a LatCrit theory and believes it is "essential to develop a LatCrit discourse in order to clarify the specific historical differences that

exist" between differing groups of Latinos as well as with other communities of color. My personal and experiential knowledge drove me to study the underlying factors of this phenomenon using a Latino perspective or framework and after attending a meeting of Chicano activists, my conviction to do so was further strengthened.

The La Raza Unida Summit[5] I attended was coordinated by among others, one of the founders and leaders of the now defunct La Raza Unida Party, Jose Angel Gutierrez. It was chance to attend a rally reminiscent of those held during the Chicano Rights Movement of the late 1960s and 1970s. In attendance were many activists that I had only read about. There were researchers and academics that began their activism as graduate students and young professionals seeking to change the state of affairs for Chicanos in Texas. For many in my generation, Jose Angel Gutierrez epitomized of what it meant to be a Chicano during *el Movimiento* – brash, abrasive, confident, proud, angry, intelligent, articulate, activist, advocate. I eagerly anticipated his rhetoric and spirit.

Gutierrez did not disappoint. He spoke eloquently about the pertinent issues affecting Mexican American communities including health care, immigration, (under and un)employment, criminal justice, and education. His opening remarks provoked thought and overwhelming applause, interweaving political strategy with policy solutions to problems faced by Chicanos. He situated the Chicanos history of colonization and racism in the way advocated by Nuñez (1999) – developing a specific narrative towards the Chicano plight. Using Spanish, English and Spanglish "off-the-cuff" remarks to highlight inconsistencies between policies implemented by the George W. Bush

[5] The meeting was scheduled in June 2003 on the campus of Our Lady of Lake University (OLLU) in San Antonio, Texas. OLLU is located on the Westside of San Antonio, a focal point of Chicano activism, art, culture and politics. The site provided a wonderful backdrop to the meeting.

administration and democratic values, Gutierrez called for social activism, grass-roots political organization and real-world, practical policy alternatives (Nuñez, 1999; Trucious-Haynes, 2001; Valdes, 1997). He asked attendees to "think outside the box" as we broke off into policy issue focus groups.

This particular study focuses on political and policy discourse of school leadership; however, it rests on the intersection of race, politics and policy that was hinted at – but not crystallized – during the La Raza Unida Summit. Although inspired and energized from the gathering, I was amazed that the leaders and attendees never recognized the interconnectedness of these key factors. Involved was political strategy, analysis of state and federal policy and certainly a discussion of racial discrimination and cultural pride but a clear connection between the three was never overtly, strategically or theoretically made.

Guinier and Torres (2002) speak of this intersecting, cohesive and unifying phenomenon in terms of political race, a concept they describe as a diagnostic, aspirational and activist tool for reaching racial and democratic justice. They link power with race not only from an individual perspective, but rather from what they believe is a social phenomenon viewed by most as "natural." They state:

> Distribution of resources in this society is racialized and that this racial hierarchy is then normalized and thereby made invisible. Race can be about putting people into powerless positions which they accept as unchanging even though they recognize the injustice (pg. 15).

Gutierrez effectively roused passion and brought to the forefront a shared discontent of racial injustice, yet he did not address how the correlation between the political

mainstream and policy elites would be swayed to endorsing similar goals. More important, the question of how "mainstream" Mexican Americans would be convinced to interrogate racial issues and to critically analyze power structures as Guinier and Torres have suggested, so that the racial hierarchy is not "normalized" or made "invisible?" The summit was only the first of many to come. It was meant as a starting point, organizational in nature. Although I did not leave the meeting with a step-by-step process for achieving our goals, I nonetheless remain motivated and inspired by the groups' unity, passion of the words, and call to action.

Statement of the Problem

This study employs Critical Race Theory (CRT) and Latino Critical (LatCrit) Theory to situate the school finance debate and the policy and political discourse used by Mexican American school leadership in Texas. The concept of school finance equity and the practice of funding Texas public schools are rooted in principles of property, economic privilege and race. Today, Texas' state funding system is seen as structure in its nascent stage, having only been fully implemented since 1995 when the last of four court cases was adjudicated by the Texas State Supreme Court. The system has been termed "Robin Hood" for its method of "equalizing" funding by redistributing property taxes and state funds to property poor districts. Advocates for change fought lengthy court battles beginning in the 1960s (Cardenas, 1997), achieving what some would characterize as incremental change by the 1990s (Valencia, 2002b). "Equalization" at the district level – as defined by the courts – has been achieved. Whether intra-district, student, or individual campus "equity" has been achieved is however, debatable. Arguments are made in favor of providing an infusion of funds to the current system,

dismantling “Robin Hood” in favor of another method of funding, or overhauling school finance formulas so that more choice is afforded to parents and taxpayers. What this debate on equity, taxes and funding lacks is a race-centered discussion of the sociopolitical context or historical events that led to the current method of funding Texas public schools.

The 78th Texas Legislature recently approved House Bill (HB) 3459 which the governor signed into law. In effect, this bill eliminates “Robin Hood” as the state’s school finance system if another funding system is place by September 1, 2005. With a Republican-controlled legislature, governorship, and court system, the political climate has become one that advocates the elimination of “Robin Hood.”[6] The political rhetoric has framed the system with the term “Robin Hood.” Its connotation has not been one that fosters images of charity, equity and justice. Instead, politicians from both major parties, advocates from conservative to liberal, and administrators at both rural and urban school districts have utilized the term “Robin Hood” to argue against what they see as an unfair, under-funded, or ineffective school finance policy. As articulated by Representative Craig Eiland, Democrat from Galveston (Wolfson, 2002), “Basically, if we don’t like ‘Robin Hood,’ which we don’t, then we should eliminate at least the robbing part of ‘Robin Hood’.” Texas Governor Rick Perry reiterates Eiland’s contention that unfairness is central to the system. He states, “I think “Robin Hood”, basically, is an unworkable and unfair system overall,” (Hernandez, 2002).

[6] In an effort to simplify definitions, the term “Robin Hood” will be used interchangeably with the Texas school finance system, school funding system, and Chapter 41. By referring to the school finance system as “Robin Hood,” the author does not wish to imply support for the negative connotation.

In Texas, as well as in the United States generally, traditionalistic and individualistic values dominate (Fowler, 2000) the political arena. School finance policy and politics is no different. The rhetoric exemplified by the previously-referenced political leaders characterizes the school finance "problem" as unfair, un-American, or "stealing from the rich to give to the poor." This perception prevails despite the fact that in school year 2002-03, 90% of the 1037 school districts in Texas benefited from the "Robin Hood" system (Montgomery, 2003). The governor has called a special session on school finance for the spring of 2004. The legislature will be charged with creating a new system of funding Texas schools. How Mexican American leadership answers the call to this affront on equalized school funding may well set the course for the next several generations of poor, Chicano school children.

Scope and Purpose

As Ladsen-Billings (1998) has noted, "no area of schooling underscores inequity and racism better than school funding." The history and current state of school finance policy in Texas exemplifies Ladsen-Billing's description of an institutionalized, racist structure. With the pending special legislative session on school finance, an opportunity to examine the political and policy discourse surrounding this issue will arise. Mexican American school leaders should play a role advocating for their community. Most recently the Mexican American leadership's concern was exemplified in their fight against the state's high-stakes testing system.

The main purpose of this dissertation is to understand the type of political and policy discourse utilized by Mexican American school leadership in Texas. The study is situated within the school finance debate and is analyzed from a critical race perspective.

Investigating how or if this leadership considers race and racism in their discourse is central to an understanding of the phenomenon. The state of Texas has a long history of unfair and inequitable distribution of school funding resources (Cardenas, 1997; Kozol, 1991; San Miguel, 1987; San Miguel & Valencia, 1998). Determining whether school leadership is deemed powerless in the political process and understanding their notion of political race as described by Guinier and Torres (2002) is a first step towards formulating effective political and policy solutions and reigniting social activism and justice efforts. How do Mexican American superintendents characterize the school finance system? How do they explain its effects on their communities? Do they refuse to "rock the boat"? Developing an understanding of these questions becomes tantamount to achieving social justice and policy reform.

As demonstrated by many notable scholars (Acuña, 1988; Allsup, 1982; Cardenas, 1997; San Miguel, 1982, 1987; San Miguel & Valencia, 1998; Spring, 1997; Takaki, 2000; Tyack & Cuban, 1995; Valencia, 2002b), Mexican American communities have always understood the importance of educating their children. Whether it be opening their own schools, sending their children to Mexico to be educated or making their best attempt to assuage unforgiving and unbending majority populations, Mexican Americans have striven to succeed and achieve the "American Dream"(Allsup, 1982; Cardenas, 1997; San Miguel, 1987). Some would suggest that this is required of any "immigrant" population (Gordon, 1971) without first realizing the history of Chicanos, racism, and discrimination in Texas. Others would consider this assimilationist notion of success as ***the*** "problem" (Blauner, 1987). Investigating the perceptions that Mexican American superintendents and school leaders have towards education, school finance

policy and race will provide an entry point towards understanding this broader, more complex issue.

Research Questions

In an effort to understand the intersection of race, politics and policy in the lives of Mexican American school leadership I will utilize the following central research:

> What is the nature of the discourse utilized by Mexican American school leadership surrounding the school finance policy debate in Texas?

Secondary research questions used to investigate the broader context of the political, policy and racial discourse are:

1. How do Mexican American school leaders utilize their own racial identity and lived experience in formulating political and policy discourse?
2. In what ways do Mexican American school leaders consider notions of race and racism as they examine the state of school funding in Texas?

Implications and Significance

This study contributes to the developing scholarship in educational administration, specifically in the area of the politics of education and education policy analysis. As noted by Parker (2003), analysis from a critical race perspective is rare but essential to representing the marginalized point of view. Furthermore, it contributes to the burgeoning scholarship begun by critical race theorists in legal studies and education, specifically Ladsen-Billings (1998; 1997), Tate (1999; 1997), Parker (1998; 2002), Solórzano (1998; 2001; 2002) and López (2003) among others.

This research has implications for the training of school leadership in areas of critical race thought, policy analysis and politics of education. The school leader or

superintendent occupies many roles in administering a school district. More frequently, the superintendent is perceived as a political actor immersed in a process teeming with politics, conflict and power. Superintendents are the recipients of national and state education policy that often come in the form of unfunded mandates. It is critical that these leaders become politically astute and skilled in the ways of public relations, policy analysis and political strategy. For Mexican American and Latino leaders, the problem is amplified by the severity by which education policy has historically oppressed Chicano school children.

Most importantly, this research has a direct connection to social justice and social activism for Mexican American and other marginalized communities of color. The schools have long been a social, cultural and community center for Mexican American people. Now more than ever, schools have become central to political activism. With the onslaught of conservative policies and agendas (i.e. institution of high stakes testing mechanisms, elimination of bilingual education, promotion of monocultural curriculum), utilizing the schools as centers of democracy and action will be vital to the success of Chicano school children. Leaders will emerge from this space. Therefore, understanding the process by which a merging of leadership, social justice and education policy and politics occurs will be necessary for its replication. These communities need leaders that are critical, loyal and courageous in defending their right to a just, equitable and quality education.

Limitations

There are four limitations to this study. First, the participants will consist solely of Mexican American superintendents and school leaders. This will prevent me from

being able to generalize any thematic findings to the whole population of administrators or even the Mexican American community. Second, the participants will also be all male. As with the first limitation, this will limit generalizability. Third, the dissertation uses school finance policy as the window from which to investigate the intersection of race, politics and policy. The extent that other educational policies will yield similar phenomenon is not known. Fourth, this is not a study of policy formation or the effects that Mexican American superintendents or school leaders have on the policy stream. It will only inform the effect that their understanding of race or their own racial identity has on the way that they frame or situate themselves in the debate on school finance.

Organization of the Study

The following chapter provides a review of the two major literatures that will situate the study – race, racism and racial analysis literature and literature on the political history of school finance policy in Texas. The first section on race, racism and critical race frameworks defines the discourse on race, outlines types of racism and delineates critical race theory. Latino critical race theory will be highlighted as outgrowth of critical race theory. The second section of the literature review will introduce the political context of school finance policy in Texas. The gap within these two major streams of literature is elucidated and the study's findings are situated within this gap.

Chapter Three introduces my research methodology and focuses on addressing the central research question in this chapter. The section includes a brief description of the method, design, participant selection, data collection and analysis, and a trustworthiness issues.

Chapter Four presents the major thematic findings by outlining the three major emergent themes from the interview data. The first section situates the participants as driven by determination, work ethic and familial support, while the second and third sections discuss the politics of a coalitional association and the participants' views of race and racism in education, respectively.

Chapter Five provides findings and a critical race analysis of Texas school finance policy and the discourse utilized by the participants both in public and in private interviews. In the first section, three chapters of the Texas Education Code are reviewed and an analysis of the participants' districts is conducted. The second section outlines the educational leaders' discourse regarding the current state funding system as inequitable, unfair and insufficient. The final section demonstrates how the public discourse contradicts what is stated privately by the participants.

Chapter Six concludes the study by summarizing the findings from the previous two chapters, laying out implications for practice, theory, policy and future research, and providing conclusions to the study.

CHAPTER II: REVIEW OF LITERATURE

Introduction

In order to understand the political and policy discourse used by Mexican American school leadership participating within the school finance policy debate in Texas, I plan to analyze their personal narratives, public discourse and current school finance policy using a critical race lens endorsed by scholars in legal studies (Bell, 1992, 1995; Crenshaw et al., 1995; Delgado & Stefancic, 2001, 1998; Guinier & Torres, 2002; Nuñez, 1999) and education research (Delgado Bernal, 2001, 2002; Haney López, 1998; Ladsen-Billings, 1998; Ladsen-Billings & Tate, 1997; López, 2003; López & Parker, 2003; Parker, 1998, 2003; Parker & Lynn, 2002; Solórzano, 1998; Solórzano & Delgado Bernal, 2001; Solórzano & Yosso, 2001, 2002). As was stated in Chapter One, such an investigation will necessitate a discussion of literature on the topics of race and racism and an historical review of the politics of school finance policy in Texas. This chapter attempts to outline and summarize the major literature and theoretical streams of thought surrounding critical race perspectives and the understanding of the politics of school finance policy. As is the case with literature reviews, I do not contend that the manner in which I summarize the literature is thoroughly complete. I believe it merely serves as a launching point from which to conduct the study.

Literature on Race, Racism and Race Theory

> The problem of the twentieth century is the problem of the color-line, the relation of the darker to the lighter races of men in Asia and Africa, in America and the islands of the sea. It was a phase of this problem that caused the Civil War; and however much they who marched South and

> North in 1861 may have fixed on the technical points of union and local autonomy as a shibboleth, all nevertheless knew, as we know, that the question of Negro slavery was the real cause of the conflict. (Du Bois, 1994, pg. 9)
>
> *Black people will never gain full equality in this country. Even those Herculean efforts we hail as successful will produce no more than temporary "peaks of progress," short-lived victories that slide into irrelevance as racial patterns adapt in ways that maintain white dominance. This is a hard-to-accept fact that all history verifies. We must acknowledge it, not as a sign of submission, but as an act of ultimate defiance.* (Bell, 1992, pg. 12)

The discussion and defining of race is contentious and complex. As exemplified by the previous quotes by two of the foremost scholars on issues of race and racism, it is evident that a universally-accepted or fixed concept of race does not exist (Andersen & Collins, 1995; Blauner, 2001; Delgado & Stefancic, 1998; Omi & Winant, 1994). Omi and Winant (1994) speak of a "continuous temptation to think of race as an *essence*, as some thing fixed, concrete and objective" (pg. 54). They go on to describe that the "opposite temptation: to imagine race as a mere *illusion*, a purely ideological construct which some ideal non-racist social order would eliminate" (pg. 54) similarly does not capture an understanding of race. In *The Latino Condition*, Delgado and Stefancic (1998) introduce their section on race and racism and its relevance to Latino populations by describing the term nativism as "periodic waves of anti-immigrant sentiment, coupled with white supremacy, that sweep the nation, making things difficult for Latinos and

other populations perceived as foreign" (pg. 147). Andersen and Collins attempt to "shift the center" in their edited work by stating that "understanding race, class, and gender means coming to see the systematic exclusion and exploitation of different groups…It means constructing new analyses that are focused on the centrality, of race, class, and gender in the experiences of us all" (pg. 4). In the preface of his book, *Still the Big News*, Blauner (2001) states that the central thesis of his earlier works concluded that "race is the central reality of the American experience, that it inhabits every aspect of our social institutions" (pg. vii.), and that even though thirty years have passed, those findings remain clear although not widely endorsed by the mainstream, "color-blind" society.

In Du Bois' case, he asserts that those persons marked as "darker" were treated differently than those "lighter." Even though the Civil War sacrifices of many Americans were for a "resolution" to the racial conflict of the time, DuBois accurately pointed out the "problem of the color-line" has persisted into the 20th century. Some contemporary scholars contend this "problem of the color-line" is invisble. Bell (1992; 1995) defiantly categorizes the struggle to end racism as futile. He argues that although the major vestiges of slavery and Jim Crow laws have been eliminated and some people of color have made it to the upper echelons of the social, political or economic structure of U.S. society, racism will never be erased. In the U.S., where notions of liberty, individualism and self-determination are reified and glorified through daily media, cultural, and political dosages, racial discourse is discouraged. But as argued by Omi and Winant (1994), it is vital that challenges to these disparate notions of race be made in order to initiate a healthy and honest discourse about race and racism.

Discourse on the Meaning of Race

Omi and Winant (1994) use three paradigms – ethnicity, class and nation – and introduce their own racial formation theory that is helpful in commencing a discussion of conceptions of race. They state,

> Racial theory is shaped by actually existing race relations in any given historical period. Within any given historical period, a particular racial theory is dominant – despite often high levels of contestation. The dominant theory provides a society with "common sense" about race, and with categories for the identification of individuals and groups in racial terms. (pg. 11)

The contestation for dominance is not limited to these three paradigms or racial formation theory. As noted by Omi and Winant, many notions of race abound. Understanding the various assumptions, their similarities to each other leads to an understanding of their conceptualizing frameworks.

Biologistic Race

Omi and Winant describe the unwillingness of social scientists to inquire about racial phenomenon. A movement shaped by "Social Darwinist currents" (pg. 10) and based on biologistic perspectives has prevented early sociologists from addressing racial theory in research. The biologistic paradigm as described by Omi and Winant (1994) "evolved since the downfall of slavery to explain racial inferiority as part of a natural order of humankind" (pg. 15). Kevles (1985) traces the history of the eugenics movement to an English scientist named Francis Galton. Galton, who happened to be a cousin of Charles Darwin, published his first ideas on eugenics in 1865. In a subsequent book, he drew from a sample of jurists, statesmen, military officers, scientists and artists to

formulate his findings. What he found was that a large number of his sample was related by blood. As Kevles (1985) stated, "Families of reputation, he [Galton] concluded, were much more likely than ordinary families to produce offspring of ability. In Galton's striking claim, heredity governed not only physical features but also talent and character" (pg. 4).

Heredity research soon began in the United States with Charles Davenport, a biologist, who followed the work of Galton and other European biologists. He first set up a laboratory on Long Island, New York in 1904. Then in 1911 he published *Heredity in Relation to Eugenics* in which he found that "heredity determined the characteristics both of Negroes…and of immigrants then flooding into the United States" and like many scientists of his time argued that "patterns of heritability were evident in insanity, epilepsy, alcoholism, 'pauperism', criminality, and, above all, 'feeblemindedness'" (Kevles, 1985, pg. 46).

Historical scholarship further illuminates how the eugenics movement infiltrated and shaped the development of the U.S.'s political, social and economic structure. Takaki's (2000) description of Dr. Benjamin Rush, one of the "founding fathers," correlates to the "scientific" classification of blacks as inferior and "diseased." As noted in a paper he presented to an American Philosophical Society meeting, Rush believed that "black Color (as it is called) of the Negroes is derived from Leprosy" (Takaki, 2000, pg. 30). He sought to find "cures" and developed diagnostic techniques to "whiten Negroes" (pg. 32). Others such as Horsman (1998) and De León (1998) note the political and economic forces promoted a biologistic theory of the races. Horsman (1998) states, "The catalyst in the overt adoption of a racial Anglo-Saxonism was the meeting of Americans

and Mexicans in the Southwest, the Texas Revolution, and the war with Mexico" (pg. 149). De León found that "[a]s for the Mexican aborigines, the English conceived of them as degenerate creatures – un-Christian, uncivilized, and racially impure" (pg. 158). It behooved whites to adopt this notion of superiority and racial class as they sought military means for justifying U.S. imperialism. The eugenics movement flourished throughout the majority of the country's history and continues to be popularized today by "scientific" educational research, is practiced by social "elites" and promulgated by the mainstream media. Valencia and Solórzano (1997) demonstrate how this "scientific" method, although denied and discredited by many in the social science community, continues to be replicated in education research, while Alemán (1999) found that national media outlets favorably covered the eugenic-centered comments of a university law professor.

Ethnic Race

The "common-sense" inculcated in society's psyche immediately following the biologistic era is represented by ethnicity theory. Ethnicity theory was the dominant paradigm of the 20th century and evolved as a direct contradiction to the eugenics movement. The theory employed concepts of assimilation and cultural pluralism as central tenets in explaining ethnicity. Glazer and Moynihan (1975) describe the concept of ethnicity as "steady expansion of the term 'ethnic group' from minority and marginal subgroups at the edges of society – groups expected to assimilate, to disappear, to continue as survivals, exotic or troublesome – to major elements of a society" (pg. 5). More specifically, Glazer and Moynihan (1975) state that ethnic groups "refer not only to

subgroups, to minorities, but to all the groups of a society characterized by a distinct sense of difference owing to culture or descent" (pg. 4).

Milton Gordon (1971) used the concept of assimilation to expand an understanding of ethnicity. He explains assimilation as a multi-step process where ethnic groups about the "cultural behavior patterns of the 'host' society" and do so in three ways: they conform to the dominant Anglo group (Anglo-conformity); meld into an "American," hybrid culture (melting pot); or continue to exist within separate groups (cultural pluralism). In all, Gordon discusses a Eurocentric model of ethnicity, devoid of historical context and understanding of African American, Mexican American, Puerto Rican, Asian American or Native American experiences. Alba (1985) and Feagin and Feagin (1999) speak to the Gordon's findings of assimilation with their studies on Italian and Irish Americans, respectively.

Nation Race

Omi and Winant (1994, pg. 37) have noted, "nation-based theory is fundamentally rooted in the dynamics of colonialism." They introduce Pan-Africanism, cultural nationalism and internal colonialism as major theoretical frameworks for discoursing race with a nation-based theory. Perhaps the most notable scholar responding to Glazer and Moynihan's and Gordon's theses of ethnicity and assimilation is Robert Blauner (1987; 2001). In his chapter "Colonized and Immigrant Minorities" (1987), he describes the experiences of people of color in the U.S. in terms of a third world perspective – a radical political ideology first made popular in the late 1960s. By employing this term, Blauner explicitly points to a

> *Basic distinction between immigration and colonization as the two major processes through which new population groups are incorporated into a nation*. Immigrant groups enter a new territory or society voluntarily…Colonized groups become part of a new society through force or violence; they are conquered, enslaved, or pressured into movement. (pg. 149)

The experience of people of color in the U.S. is involuntary, as colonized groups. Put more poignantly, Omi and Winant (1994) state that "[f]or most of its existence both as European colony and as an independent nation, the U.S. was a racial dictatorship. From 1607 to 1865 – 258 years – most non-whites were firmly eliminated from the sphere of politics" (pgs. 65-66). Colonization theory strongly contested the assumptions made by ethnicity or assimilation theory and facilitated the evolution of a new paradigm – nation-based theory.

Pan-Africanism and cultural nationalism are exemplified in the autobiographical writings of Malcolm X, co-author Alex Haley (1964), and Jose Angel Gutiérrez (1998). Malcolm X describes his black nationalist organization as a self-sustaining mechanism for black U.S. citizens; as an entity capable of forming coalitions with African peoples; and as a source of defense for blacks culturally and physically abused or mistreated by whites.[7] Gutiérrez, along with other Chicano activists, framed his political activism around solidarity with Mexican people, the indigenousness of Chicano and a return to

[7] Perhaps one of Malcolm X's most famous quotes which speaks to his belief in the self-determination and self-preservation of black Americans is (pg. 367), "I don't speak against the sincere, well-meaning, good white people. I have learned that there are some. I have learned that not all white people are racists. I am speaking against and my fight is against the white racists. I firmly believe that Negroes have the right to fight against these racists, by any means that are necessary."

Aztlan, the mythical Chicano homeland. Both men depicted racism as a means of white domination and oppression that could be countered by political activism, group consciousness, and self-preservation.

Pinkney (1976) states that "among black people in the United States, nationalism is often said to have originated in the nineteenth century, but some of its manifestations go as far back as the sixteenth century" (pg. 1). He cites James Turner (pg. 4) and outlines the elements of black nationalism as including self-determination for blacks, a common group unity amongst all people of African descent, a systematic resistance to oppression, pride in their race, and the revaluation of self. Appiah (1998) argues against the use of "race" in a nationalist framework as suggested by Pinkney and others like Marcus Garvey, Stokley Carmicheal, Ramsey Muniz, Jose Angel Gutiérrez and Malcolm X. He states,

> "Race" disables us because it proposes as a basis for common action the illusion that black (and white and yellow) people are fundamentally allied by nature and, thus, without effort; it leaves us unprepared, therefore, to handle "intraracial" conflicts that arise from the very different situations of black (and white and yellow) people in different parts of the economy and of the world. (pg. 116)

Appiah believes that arguments made from a Pan-African or cultural nationalistic perspective are rooted in biologically concepts of race, thus wiping out many of the natural collations that African peoples can form with Mexican American, Puerto Rican or Asian American communities.

Class Race

Jonathan Kozol (1991), in his book *Savage Inequalities*, documents some of the most underfunded, neglected and forgotten U.S. public schools. He focuses on the inner-city communities these schools serve and highlights the extreme poverty, unemployment rates, and instances of infant mortality that communities contend with. Throughout, Kozol asks pertinent questions as to why a nation so rich, powerful and in possession of abundant resources allows certain segments of their society to be so mistreated and disrespected. Omi and Winant (1994) regard discussion of race in this framework as one that operates from a class paradigm. They employ stratification theory that understands society as a "social distribution of resources" (pg. 27) and class conflict theory that is rooted in the "concept of exploitation" to explain the phenomenon that relegates segments of society in poverty.

Langston (1995) argues that from a class(less)-perspective, the individual's personal attributes, whether laziness, ignorance, or unluckiness, is to blame for their predicament. As she notes, this individual-based myth helps the middle and upper classes to deny their privilege, "It reinforces middle- and upper-class beliefs in their own superiority" (pg. 101). Langston more specifically points out how the "old boot strap theory" overlooks and denies how social and class divisions "reinforce ruling class control and domination" (pg. 100) by focusing on those successful enough to work their way up the socio-economic ladder. In his book *The Truly Disadvantaged*, William Julius Wilson (1987) examines the "ghetto underclass," analyzes the problems of crime, non-traditional families, and joblessness, and argues for policies that are not race-specific. He contends that issues of poverty transcend race and should be dealt with by instituting policies and programs that will specifically address those that are "truly disadvantaged."

The stratification theory provided by Omi and Winant (1994) correlates well with Kozol's findings in his study of "savage(ly) unequal" schools. That these schools all happen to be in inner-cities and populated by children of color is no coincidence. In the chapter about East St. Louis, Missouri, Kozol describes visiting a school named after Martin Luther King, Jr. In one of the classrooms he visits he facilitates a discussion with a group of students about Dr. King's famous "I have a dream" speech. He gets a tepid response from the students. After the class period is over, a young man walks over to him and states,

> "Write this down. You asked a question about Martin Luther King. I'm going to say something. All that stuff about 'the dream' means nothing to the kids I know in East St. Louis. So far as they're concerned, he died in vain…he died and now he's gone. But we're still here. Don't tell students in this school about 'the dream'. Go and look into a toilet here if you would like to know what life is like for students in this city." (pg. 36)

What Kozol sees is not unlike what could be expected of a prison bathroom portrayed in movies such as "Escape from Alcatraz" or notions of a Russian gulag – no doors in the stalls, no toilet paper, no toilet seats, no soap, no hand towels, and corroded commodes made so by the vile water that runs through the pipes of the school. Langston (1995) has described how middle and upper class segments of society may rationalize the fact they "have" while others do not. It is a process in which racist normalization and the class-base paradigm of race are utilized.

Socially-Constructed Race

Race is a social construct (Appiah, 1998; Blauner, 1987, 2001; Crenshaw et al., 1995; Guinier & Torres, 2002; Omi & Winant, 1994; Takaki, 2002). It is political, social, historical process by which domination and hegemonic forces attempt to normalize the distribution of resources, subjugation of marginalized groups and oppression of communities of color. The racialization of African Americans during the development of the original thirteen colonies was brought upon the need for labor and the expansion of European-controlled territories, while the racialization and subsequent extermination of Native American peoples was also the result of U.S. economic interests (Takaki, 2000). Mexican American were racialized during the U.S. Bracero program of the 1940s and 1950s, while Japanese Americans were imprisoned in labor camps during World War II (Acuña, 1988). Each groups "racial" identity has been marked and re-marked at different points in U.S. history.

Omi and Winant (1994) define race as a

> Concept which signifies and symbolizes social conflicts and interests by referring to different types of human bodies…selection of these particular human features for purposes of racial signification is always and necessarily a social and historical process. (Omi & Winant, 1994, pg. 55)

Their racial formation theory suggests that "[R]ace becomes 'common sense' – a way of comprehending, explaining, and acting in the world" (pg. 60). A socially-constructed framework allows for the analysis of phenomenon in a racist society such as the way that the "bad" schools are in the communities of color or that most children of color are poor. Bell (1992) and Kozol (1991) provide examples in which dominant discourse and racist communities refuse to "see" racial oppression. A socially-constructed theory of race

combats notions of biology and nature and does not allow class-based theories to co-opt epistemological or ontological concerns.

Guinier and Torres (2002) utilize the metaphor of the miner's canary to define race. In their analysis they compare racialized communities to the canary that miners take with them as they descend into mines. The canary is taken to gauge air quality in the often-toxic mines. Whenever the presence of toxic or poisonous gas is present the canary's sensitive respiratory system detects danger. They state that the canary's "distress is the first sign of a danger that threatens us all" (pg. 11). Guinier and Torres take the socially-constructed race described by Omi and Winant a step further in their conceptualizing of political race. They consider political race a concept that has promotes an "effort to change the framework of the conversation about race by naming relationships to power within the context of our racial and political history" and "reveals race as a political, not just a social, construction" (pg. 15). The concept both aspires political activism and detects threats to democracy and social justice.

Finally, Espinoza and Harris (1998) describe how the terminology of race has shifted over time, from a scientific understanding of categories such as Negro, Caucasian and Mongoloid which had "scientific bases" (pg. 1608) in the eugenics movement discussed by Kevles (1985), to the social (i.e. Black, White, Asian) and ethnic (i.e. Hispanic, Pacific Islander) categories used currently. They note that:

> This is the problem of race. It is both easily knowable and an illusion. It is obviously about color and yet not about color. It is about ancestry and bloodlines and not about ancestry and bloodlines. It is about cultural histories and not about cultural histories. (pg. 1610)

Their challenge lies in researching, discoursing and problematizing race without becoming part of the oppressive system.

Racism and Racialization

The salience of racism is debated on multiple levels and from differing perspectives. The debate over the validity of race discourse or the presence of racism in society usually hinges on the acts of individual "racists" or is posed in a "natural" or biological framework. A traditional view is provided by Feagin (1984) in which he describes racism as "*an ideology which considers a group's unchangeable physical characteristics to be linked in a direct, causal way to psychological or intellectual characteristics, and which on this basis distinguishes between superior and inferior racial groups*" (pg. 5). Individual acts of racism committed by overt racists are most easily detected when tied to phenotype and to the biologistic conception of race. Whether it is the dragging death of James Byrd in Texas or a group of white supremacists marching towards a town square, the images are vile to many. However, race and ethnicity scholars also take a more broad view of racism. Blauner (2001) frames it in terms of racial oppression and relies on the concept of colonialism to interpret how "our own development [U.S.] proceeded on the basis of Indian conquests and land seizures, on the enslavement of African peoples, and in terms of a westward expansion that involved war with Mexico and the incorporation of half that nation's territory" (pg. 22). Omi and Winant (1994) hold that like race, the meaning and discourse of racism has evolved over time. They state that

> a racial project can be defined as *racist* if and only if it *creates or reproduces structures of domination based on essentialist categories of*

> *race*...there can be no timeless and absolute standard for what constitutes racism, for social structures change and discourses are subject to rearticulation" (pg. 71).

Some scholars believe it is the institutionalized, structural or organizational racism that is pervasive in our society that lies at the base of oppression (Blauner, 2001; Guinier & Torres, 2002; Omi & Winant, 1994; Scheurich, 2002; Takaki, 2002).

Another perspective is documented by Yamato's (1995) outline of four types of racism that she notes as prevalent today. They include aware/blatant racism, aware/covert racism, unaware/unintentional racism, and unaware/self-righteous racism. The aware and blatant racism is described as the work of outright racists who openly and bluntly practice prejudicial or discriminatory acts towards people of color they view as inferior. This is the type of racism that most people think of when arguing for a color-blind society. The aware and covert racism is practiced by "closet" racists who will not show their prejudice in public but believe in white superiority wholeheartedly. Examples include instances in which people of color attempt to buy a house in a certain neighborhood and are refused due to discriminatory practices. The white, liberal activist is usually guilty of practicing unaware and unintentional racism. Scheurich and Young (2002) describe this phenomenon in academic research in which the epistemologies of the dominant group are often left unchecked. Malcolm X's (1964) example in which a white, college student approached him asking him what she could do to "help" the situation in urban America, more clearly exemplifies this type of racism. In both cases, members of the white, dominant group fail to realize or comprehend how their white privilege supports the racial hierarchy. Finally, the unaware and self-righteous racism described by

Yamato describes both those in the dominant and dominated group who attempt to either shame people of color into rejecting notions of racism or internalize racism as "their fault" (i.e. an individual failure).

Scheurich and Young (2002) also delineate different types of racism; however, they do so by distinguishing between racism at the individual, institutional, societal and civilizational levels. They describe overt and covert racism as occurring at the individual level and state that institutional and societal racism occur at the organizational or social level. Institutional and societal racism provide the foundation from which individual level racism is created. All three exist within the civilizational level in a hierarchical structure. Overt and covert racism are defined similarly to Yamato's terms, however Scheurich and Young (2002) are explicit in the fact that most people consider racism from an overt, individual perspective. They state,

> If a person answers 'no' to the question of whether she or he is racist, the respondent typically means that she or he does not, as an individual, engage in conscious, intended racism or that she or he is not, as an individual, consciously racist. (pg. 53)

Scheurich and Young argue (2002) that critiquing research epistemologies from an individual perspective does not yield a sufficient evaluation of whether racism exists. The perspective must be from one of the other three levels.

Blauner (2001) traces the history of the "widening conception of racism" (pg. 196) between whites and blacks in his chapter titled, "Talking Past One Another." He details how the individual level racism was popular until the 1960s when Stokley Carmichael and Charles Hamilton coined the phrase "institutional racism" in their 1967

book, *Black Power*. In it, they define institutional racism as "more fundamental than individual racism…built into society and scarcely required prejudicial attitudes to maintain racial oppression" (pg. 197). Scheurich and Young (2002) similarly define institutional racism as existing within institutions, organizations and structures. The second type of social racism, societal racism, they find occurs in the same manner as institutional racism, however from a "broader, society-wide scale" (pg. 55). They also broadly define civilizational racism as occurring when whole civilizations (i.e. Hopi Indian, etc.) are racialized and oppressed by the dominant group.

A Critical Race Theory (CRT) Perspective

Critical race theorists posit that institutions, systems, social norms and practices are grounded upon property rights and point to the U.S. Constitution as highlighting the tension between the property rights and the human rights it manifests (Ladsen-Billings & Tate, 1997). For example, Africans were property to be legally sold and used as commodities in the U.S. economic structure, while Native Americans were treated like expendable "savages" who possessed land necessary for European expansion and profit (Spring, 1997; Takaki, 2000). In education, funding of public schools has a long history of inequity, discrimination and racism. A reliance on local property rights was instituted to create a racial hierarchy. Utilizing this perspective to situate and analyze the data will be further discussed in Chapter Three.

Various education scholars have studied governmental structures, processes and systems as conduits to a hegemonic society (Ladsen-Billings & Tate, 1997; Spring, 1997; Takaki, 2000; Valenzuela, 1999). They study and understand inequity in education using some of the same tenets held by Critical Race Theory (CRT) research. Taylor (1998)

describes this work as “a form of oppositional scholarship, CRT challenges the experience of whites as the normative standard and grounds its conceptual framework in the distinctive experiences of people of color” (pg. 122). Delgado and Stefancic (2001) describe CRT as a “movement” and a “collection of activists and scholars interested in studying and transforming the relationship among race, racism, and power” (pg. 2). In describing the evolution of race and critical scholarship into the CRT movement, Crenshaw (2002) notes that CRT is now used “interchangeably for race scholarship as Kleenex is used for tissue, was basically made up, fused together to mark a possibility” (pg. 1363). This “possibility” is now utilized by scholars in education, sociology, ethnic studies and women’s studies.

Origins

The CRT movement began as an outgrowth of Critical Legal Studies (CLS) and radical feminism (Delgado & Stefancic, 2001). Crenshaw (2002) notes in her reflective essay that the movement was incited by the refusal of critical legal theorists to consider their own racial and gender superiority. The Critical Legal Studies (CLS) group, dominated by white, males was challenged by a core group of legal scholars seeking to situate race at the center of the discourse. Among those leading this burgeoning form of scholarship was Harvard law professor, Derrick Bell (Crenshaw, 2002), known to many as the “movement’s intellectual father figure” (Delgado & Stefancic, 2001, pg. 5). Derrick Bell was a law professor at Harvard Law School until the early 1980s when his departure and the refusal of the school’s administration to hire another professor of color to teach his class on race and constitutional law sparked students to question hiring practices (Crenshaw, 2002).

The controversy sparked young scholars and law professors to lead to a summer conference in 1989 in Madison, Wisconsin (Crenshaw, 2002; Delgado & Stefancic, 2001). Among present were Richard Delgado, who by this time was on the faculty at the University of Wisconsin law school, and Kimberlé Williams Crenshaw, who returned as a visiting fellow. As Crenshaw (2002) recalls,

> Although there were undoubtedly many objectives to be served by such a retreat, foremost in my mind was determining whether something substantive held the group together, something that constituted a distinctive contribution to the discourse on race and the law. More specifically, I wondered whether it could be said that there was a "there" somewhere in the intertices of conventional civil rights discourse and conventional Critical Legal Studies. We had launched simultaneous critiques – of CLS, on the one hand, and of liberal race theory on the other… (pg. 1360)

The group of few began to outline the assumptions, arguments, definitions and future research agenda for critical race theorists. Subsequent conference and writing workshops would yield a plethora of literature to the discourse. Central tenets framing this discourse dominated early research.

Central Tenets

Scholars within CRT operate under the following central tenets (Crenshaw et al., 1995; Delgado & Stefancic, 2001; López & Parker, 2003; Parker, 1998): racism is endemic and ingrained in U.S. society; the civil rights movement and subsequent laws need to be reinterpreted; concepts of neutrality, objectivity, color-blindness and

meritocracy need to be challenged; giving "voice" to marginalized people is vital to reform, and whiteness is constructed as the "ultimate property." Solórzano (1998) adds commitment to social justice and an interdisciplinary perspective to these tenets. Specifically on education, Solórzano notes that CRT challenges the dominant education theory, discourse, policy and practice. He adds that critical race theory is significant in the way "it challenges the traditional paradigms, texts, and related discourse on race, gender and class" and that it should be noted that CRT is "anything but uniform and static" (pg. 123).

Bell (1980) elaborates on these tenets by introducing his "interest convergence" concept and expanding on his interpretation of the *Brown v. Board of Education* landmark court case. In his article, Bell (1980) defines the principle of interest convergence by describing civil rights and the actions of the dominant group. He states,

> The interest of blacks in achieving racial equality will be accommodated only when it converges with the interests of whites. However, the fourteenth amendment, standing alone, will not authorize a judicial remedy providing effective racial equality for blacks where the remedy sought threatens the superior society status of middle and upper class whites. (pg. 523)

He contends that the reason that Supreme Court shifted its thinking in the *Brown* case was not simply for a moral or human rights rationale. Rather, the shift came as a result of three reasons directly affecting white citizens:

1. The threat of a spreading communist movement. The United States government (spurred on by white, progressive liberals) was worried about its standing in

foreign relations community and wanted to avoid the embarrassment and harm to its stature that segregation posed in the eyes of the world.

2. The end of World War II. With returning soldiers of color, veterans' rights were on the forefront of many who returned from service. The desegregation of schools was at the top of their list of rights they demanded. "Allowing" white and black school children to attend school together would alleviate the strain to electoral politics that resisting reform would bring upon.
3. Further economic growth or industrialization. Even in the south, segregationists were contemplating the need to transform the nature of the economic structure. Reforming the educational system to their liking was essential in re-tooling and re-training the workforce from one based on low-skill, agricultural in nature to one more-skilled for the post-war industrial complex.

As exemplified by desegregation of schools, Bell contends that civil rights strategy seeking change solely on moral grounds is problematic to the concerns of people of color.

Bell (1992) also introduces and lays the foundation for discussion of the second major tenet of CRT – the permanence of racism – in his book, *Faces at the Bottom of the Well*. He uses "literary models as a more helpful vehicle than legal precedent in a continuing quest for new directions in our struggle for racial justice" (pg. 10). In his final chapter, "Space Traders," Bell is able to discuss structural racism present in society by describing how white power brokers bargain, negotiate and deal black citizens to fictional "aliens" in an effort to ensure their own survival. The story illustrates how black citizens are characterized as inferior and expendable. Similar to Bell, Delgado and Stefancic (2001) state that "racism is ordinary, not aberrational – 'normal science,' the

usual way society does business, the common, everyday experience of most people of color in this country" (pg. 7). Lawrence (1987) further develops this tenet with his introduction of unconscious racism to the discourse. He notes,

> Americans share a common historical and cultural heritage in which racism has played and still plays a dominant role. Because of this shared experience, we also inevitably share many ideas, attitudes, and beliefs that attach significance to an individual's race and induce negative feelings and opinions about nonwhites. To the extent that this cultural belief system has influenced all of us, we are all racists. At the same time, most of us are unaware of our racism. (pg. 322)

The development of CRT was for a particular subject position. An outgrowth of this movement soon formed. It was a by-product of Critical Legal Studies, Feminist Legal theory, CRT, Critical Race Feminism and Queer legal theory – it has come to be known as Latino Critical (LatCrit)Theory (Valdés, 1997).

A Latino Critical (LatCrit) Theory Perspective

Made up of scholars who participated in the formation and growth of CRT, LatCrit is a project designed to highlight the "racing" of Latinos in the legal discourse (Trucious-Haynes, 2001; Valdés, 1997). Haney-López (1998) identifies the *Hernandez v. Texas*[8] (1954) case as way to focus the discourse and argue that "rhetorical approaches of the various courts" (pg. 1151) should be used by LatCrit theorists to "retain the language of race in explicating the relationship between Latinos/as and law" (pg. 1152). He

[8] Hernandez v. Texas (1954) is described by Haney-López (1998) as the "principal case in which the Supreme Court addresses the racial identity of a Latino/a group, in this instance Mexican Americans" (pg. 1146). His essay uses Hernandez to argue for a LatCrit framework for understanding race, racism and Latino communities.

defines race in the same manner that Omi and Winant (1994) do and shifts from a biological conception of race to one "best understood as a process of social differentiation rooted in culturally contingent beliefs in the biological division of humans" (Haney-López, 1998, pg 1152). The essay concludes by arguing that LatCrit scholarship should avoid the elimination of race discourse or the substitution of ethnicity-centered explanations as a means for understanding Latino/identity.

LatCrit scholarship is similar to CRT in that it provokes liberatory research and promotes self-determination by Latinos, for Latinos. Nuñez (1999) argues that "the best way to attack the effects of racism upon Latinos in this country is to establish a distinct Latino Critical Race Theory" (pg. 3). He understands the current discourse on race for Latinos as inadequate, married to an Anglo, racist ideology, uncooperative with other marginalized groups such as Native American, Asian, African American and Anglo communities, and in need of a definition of a pan-Latino community. Like Nuñez, Valdés (1997) believes in the need to "instill a basic sense of coalitional and egalitarian sensibilities within and beyond Latina/o scholars and communities" (pgs. 5-6).

Espinoza and Harris (1998) highlight the common ground that LatCrit and CRT scholarship share, while also critiquing critical race scholars for not complicating the racial discourse enough. They note that:

> LatCrits posit that by not complicating our understanding of race, critical race scholars have fallen into the trap of duplicating American society's foundation understanding of race. Critical race scholars see race as a black/white binary problem. Failure to see the complexity of race leads to a failure to understand racism. (pg. 1593)

Espinoza and Harris (1998) aspire to complicate the definition of race and racism by challenging LatCrits in their understanding of racial hierarchy. Trucious-Haynes (2001) further states that "Latina/os, must acknowledge and investigate the ways in which the dominant culture defines our group as a Non-White, White or non-racial group that is outside of the race discourse, in order to suit its convenience…" (pg. 3) as has been done at different points in history. She is forthright in her assertion that "[A]t a minimum, it is critical that LatCrit scholars confront our community's ambivalence about its group racial identity" (pg. 3).

Origins

Stefancic (1998) states that the Latino/a critical research has been conducted and written about for many years, although it has been ignored or marked as illegitimate by the traditional and positivistic segments of mainstream academia. She points to Rodolfo Acuña as the "progenitor" (pg. 1509) of LatCrit discourse and his book, *Occupied America*, as the first work in LatCrit scholarship for its historical accounting of Latinos, specifically Chicanos, in the United States and southwest. In the foreword of the *Harvard Latino Law Review* dedicated to the First Annual LatCrit Conference, Valdés (1997) describes the rationale and origins of this incipient movement in May 1996. As listed by Valdés (1997) the purpose for convening was:

> First, we were determined to form a regular scholarly venue for the discussion of social and legal issues especially germane to Latina/os. Second, we were determined to initiate the creation of a body of literature whose absence we deemed inexplicable and intolerable. Third, we ached

> to meet and know each other as a means of rising beyond the isolation and desolation of our ivoried lives and institutions. (pg. 3)

The movement was a work-in-progress, incited by the increased numbers of Latino law graduates entering academia and dearth of research being performed in and from a Latino perspective (Stefancic, 1998; Valdés, 1997).

Prior to the First Annual Conference, Valdés (In press) notes that Latinos gathered at 1995 colloquium of critical race theory. As an "intervention designed to highlight Latinoa/o concerns and voices in legal discourse and social policy" (Valdés, In press) the scholars sought to build upon the central tenets of CRT academicians. As Valdés (In press) notes, they "embrace CRT's original antisubordination vision and employ its first-decade learning curve as this movement's point of departure." They do so by developing commitments and techniques specific to the Latino community.

Central Tenets

In her annotated bibliography of works of LatCrit scholarship, Stefancic (1998) organizes the literature into seventeen themes. In her listing, several correspond in general to central tenets noted by other scholars in this field of study. They include (pgs. 1511-1515) storytelling/counterstorytelling and "naming one's own realty," Latino/a essentialism, black/brown tensions, assimilationism and the colonized mind. Valdés (In press) demonstrates the movement's centering on storytelling and "naming one's own reality" by noteing that "LatCrit theory self-consciously endeavors both the creation of scholarship through community and the creation of community through scholarship." This is evidenced by the annual meetings of LatCrit scholars, having just held their Eighth Annual Conference in Cleveland, Ohio. Furthermore, the conferences are used as

a way to "elucidate intra- and inter-group diversities across multiple identity axes, including those based on perspective and discipline" (Valdés, In press).

Espinoza and Harris (1998) speak to the Latino essentialism and black/brown tensions highlighted and researched by LatCrits. They do so by expanding on the black-white paradigm that dominates racial discourse and explains how "the problem of mediating conflicts among different 'subject positions' is central rather than peripheral to the LatCrit project" (pg. 1605). The Latino identity is diverse and must acknowledge the link between their community and the racialized "others" (Espinoza & Harris, 1998; Haney-López, 1998; Valdés, 1997).

Literature on Race, Politics and School Finance Policy

Politics pervades throughout the schooling process and within policy-making institutions. Some research has traced the history of the politics of education field of study and demonstrated how previous works have argued that politics is not and should not have a place within educational research (Cibulka, 1994; Scribner, Alemán, & Maxcy, 2003). Others have stated that "everything is political" from macroprocesses at the federal and state level to the micropolitical level of local school districts and campuses (Marshall & Scribner, 1991). Some researchers focused on studying education politics from alternative perspectives in order to emphasize understanding of the negative effects that policy formation may have on marginalized communities (López, 2003; Noguera, 2001; Orfield, 2001; Parker, 2003; Valencia, 2002b; Valenzuela, 1999, 2002). Some of the questions they pose seek to critically analyze the political ramifications of education policy. How is the No Child Left Behind (NCLB) legislation affecting students of color? What will the effect of NCLB be on bilingual students? Why isn't an

examination of the racism embedded within education politics and policy a part of research, practice, or analysis? It is one of the questions of this dissertation seeks to addresss.

Race and Politcs in Schooling

The importance of education issues to the citizenry is clear. Political polls and surveys consistently show education issues at or near the top of a list of concerns of the U.S. electorate.[9] Politicians view these results as an invitation to propose programs and policy solutions to the "problems" existing in pubic education. Similarly, local politics between school board members and administrators is commonplace, arouses community contempt and/or support, and often provides fodder for local journalists. From school board meetings in which the superintendent's performance is under review to budget meetings in which the tax rate is being debated, issues of power, conflict and ideology are evident. The fact that this political theatre may seem more prevalent today than in previous eras does not diminish the fact that politics has always been the constant in educational practice and policy (Bailey et al., 1962; San Miguel & Valencia, 1998; Spring, 1997; Tyack & Cuban, 1995).

The politics of education as a field of study was first introduced by Eliot in 1959 (Cibulka, 1994; Scribner et al., 2003; Scribner & Englert, 1977). In his essay, Eliot (1959) calls for researchers to examine the effects of political decisions on schooling by administrators and elected officials. He states (pg. 1035),

[9] National survey reports co-published by the Public Education Network and *Education Week* put education issues at the top of their list of concerns. In the most recent report entitled, *Demanding Quality Public Education in Tough Economic Times: What Voters want from Elected Officials*, 55% of those surveyed consider education the top national priority followed by health care (51%), jobs and economic development (37%) retirement and social security (36%) and terrorism and security (28%) (pg. 3). In reports published in both 2002 and 2001, the results mirror the 2003 report.

> Surely it is high time to stop being frightened by a word. Politics includes the making of governmental decisions, and the effort or struggle to gain or keep the power to make those decisions. Public schools are part of government. They are political entities.

Scribner and Englert (1977) further attempt to define the field of the politics of education within educational administration research with a categorization of central concepts. In their categorization they use Easton's (1965) "authoritative allocation of values" definition of a political system to frame their discussion of government, power, conflict and policy. As Easton describes it, the political process includes an "interaction through which values are allocated for a society," (pg. 57). The "allocated" values are used to inform the policy formation process. Understanding how a community's values are manifested as policy and examining how such policy is advocated, debated and opposed prior to adoption is vital to understanding the politics of education and the democratic process.

It is my assertion that school leadership in communities of color posses a unique sense of values that they base their educational efforts upon. Considering how marginalized groups utilize certain frameworks to engage in the political and policy discourse is the first step in understanding policy problems and formulating policy solutions. How was the political debate framed by civil rights lawyers and leaders at the heels of the *Brown v. Board of Education* landmark case? How did Chicano rights activists spur the development of bilingual education programs across the nation? And, how are advocates of multiple-criteria legislation attempting to reform legislation that institutes high-stakes testing systems? These questions are at the heart of understanding a

community's values and their politics of education. As Stout, Tallerico and Scribner (1995, pg. 6) have stated,

> It is not that values have not been lurking in the background of the politics of education, but rather that a direct examination of their influence on political processes and outcomes is recent. Much of the politics of education research intended to illuminate the structures, actors, and processes of political decision. The value content of the issues was less well analyzed.

Whether they understand and utilize these unique attributes is left to be determined.

Hegemony through Racial Order

In order to understand the context from which the school finance system in Texas was created, one must first examine the current system in relation to the founding and molding of the United States, its laws and its social practices. The war for independence against England was more than anything a liberating moment for capitalism, the free market economy and Anglo domination.

> The war secured for American enterprisers freedom to convert Indian lands west of the Appalachians into private property, trade whenever and with whomever they pleased, import goods like tea and molasses without payment of taxes imposed by an external authority, issue their own currency, develop their own industries, and in general expand the market. (Takaki, 2000, pg. 5)

Kramnick (1987) in the editor's introduction of his book, *The Federalist papers*, outlines the events leading up to and culminating with the narrowly-approved ratification of the U.S. Constitution in 1787. Throughout the state-level debate over the merits of a centralized government, the primary concern raised by constituencies was the issue of who would govern and whether a central government would have "power" over the "liberty" of the states.

Under the Articles of Confederation, the state legislatures had authorized their own paper money, forgiven debts, and negotiated treaties with foreign nations. Kramnick (1987) states, "It was the particular policies pursued by these overweening legislatures, so threatening to the rights of property, which evoked the most outrage" (pg. 25). He goes on to note, "The American Revolution was not simply a conflict between Americans and British over home rule. It was also a struggle between Americans, about who would rule at home" (pg. 15). The federalists would fight for and later ratify the constitution, enabling property owners to benefit from a centralized form of government. From its earliest stages, the democratic structure, its institutions, and its practices would be grounded by a politics of elite and property. Who would govern? How would property rights be protected?

Like property, race was one of the central tenets leading to the formation of the United States. Spring (1997) explains that the "English belief in their own cultural and racial superiority over Native Americans and, later, enslaved Africans, Mexican Americans, Puerto Ricans, and Asians, was not born on American soil" (pg. 39). However, it was this belief that provided the underpinning for the elimination and subjugation of non-Anglo groups of people. Racial difference, segregation of racial

groups, and the notion of the "lovely white" (Takaki, 2000, pg. 11) would dominate social and governmental institutions. Race was clearly viewed as an essential element to the ideals of citizenship and rights in the eyes of the first legislators. As one of its first acts, the First Congress of the United States enacted the Naturalization Law of 1790. With this statute, all those wishing to prove citizenship would have to show a court of law that they resided in the U.S. for two years, were a person of good moral character and were "white" (Takaki, 2000, pg. 15).

The Republic of Texas fostered similar governmental, societal, and power structure formation to what the United States had nearly 50 years prior. The "Founding Fathers" employed a strategy to rid the land of Native American tribes, appropriate black labor, and instill a republican, puritan work ethic (Spring, 1997; Takaki, 2000). In Texas, the same effort was made to eliminate Mexicans from their land, create a dual-wage system of labor and inculcate a sense of Manifest Destiny (Acuña, 1988; San Miguel, 1987; Spring, 1997). Two of America's most notable "democratic thinkers" best exemplified these issues. Both Benjamin Franklin and Thomas Jefferson were revealing in their beliefs that whites were superior and that Texas would play a significant role in the Manifest Destiny plans of the United States. Takaki (2000) provides examples of Franklin's notion of the "lovely white," (pg. 11), while Acuña (1988) states, "Jefferson predicted that the Spanish borderlands 'are ours the first moment war is forced upon us'" (pg. 6-7). It would not be until 1836 that war would be "forced upon" the United States by a struggling, poor, and resource-stripped nation. Once the Texans defeated the Mexican Army with the help of American "men, money and supplies" (Acuña, 1988, pg. 13), the creation of dominant and subordinate classes was imminent.

Common Schooling and the Loss of Property

Education was a primary instrument for instilling a nationalistic culture, a republican work ethic and principles and institutions of social order (Kaestle, 1983; Katz, 1987; Spring, 1997). The common school framework would prepare the citizenry for competition in the market economy, while at the same time denying the opportunity to the vast number of women, Native Americans, Africans Americans and new immigrants flocking to U.S. shores (Parkerson & Parkerson, 2001, pgs. 37-38). Because the public schools in Texas were not welcoming to Mexican children, parents turned to private and religious schools to educate their children (San Miguel, 1987, pgs. 7-11). The large majority of Mexican American children, however, received substandard or no educational opportunities at all. The common school movement was instrumental in aiding the dominant group in socializing and producing "good citizens." The system of school funding would provide yet another tool in establishing a framework of domination and subjugation of Mexicans and blacks in Texas. Local control, as will be delineated in the next section, would allow property owners to determine the amount of funds dedicated to schooling, what groups would receive funding, and how children would be educated.

After the Texas-Mexican War of 1836, the Mexican majority soon lost all political and economic power. As San Miguel (1987) states:

> In parts of South and West Texas, Texas Mexicans maintained their numerical superiority, but they still lost control of the political process during the third quarter of the nineteenth century...In West Texas, Anglos gained control of land several decades later. The process of land

> displacement was complete by the 1880s when Anglos had gained ownership of the most valuable real estate throughout the state. (pg. 4)

Mexicans lost their land and white cattle ranchers and farming interests soon took control of the Texas economy. Acuña (1988, pgs. 29-30) notes, "By 1860, Anglo-Americans dominated the Texas economy. A census taken in that year showed that 263 Texans owned over $100,000 in real property…only 2 were of Mexican extraction…" Bringing the Mexican population under its authority and controlling the majority of the land were the first two steps in white domination. The third step involved the recruitment of certain Mexican elites to act as liaisons or bridges to the Mexican American population (Montejano cited in Spring, 1997, pgs. 198-199).

Resistance and Activism

The Mexican American elites would serve an integral role in helping to continue white domination once the economy of Texas shifted. The transformation of the economy from primarily ranching to farming required a steady stream of cheap labor. Because of the state's proximity to the border, the depressed nature of the northern Mexican economy and persuasive tactics of Mexican American elites, the supply of labor was never in short demand. However, in the off-season when crops were not ready to be harvested, farmers and local citizens found it necessary to get Mexican American children "off the streets." They attended separate schools lacking adequate resources, housed in antiquated facilities, and staffed by an untrained faculty (San Miguel, 1987; Spring, 1997; Wilson, 2003). Compulsory laws were either enforced or ignored based on the seasonal needs of farmers. Many administrators "provided educational reasons for not enforcing the compulsory law…They argued that the increase of Mexican enrollment

would financially burden the school budget" (San Miguel, 1987, pg. 52). It was not until the state instituted funding formulas that generated state monies based on attendance that Mexican American and black students were "wanted" in schools (Cardenas, 1997). However, labor, economic cycles and trends, and racist beliefs continued to serve as the primary determinants of the type of education racial minorities could receive. Legally, separate "Mexican" and "Colored" schools would continue to operate under the authority of the Texas judicial system (Wilson, 2003).

Segregation served as a gatekeeper or barrier to equal access to educational opportunity. The practice was vital to public education in Texas (Wilson, 2003). Even after the enforcement of compulsory laws became commonplace, segregation became universal and much more rigid. Global events soon swayed anti-segregation and equality movements ignited a wild fire of activism.[10] Continued discrimination, prejudice and racism further fueled the winds of change initiated by the NAACP (National Association for the Advancement of Colored People) and LULAC (League of United Latin American Citizens) as they litigated cases against segregation (San Miguel & Valencia, 1998; Wilson, 2003), and school finance (Cardenas, 1997; Parkerson & Parkerson, 2001; San Miguel, 1987). Inequity in school funding would remain an on-going battle minority groups engaged in their dual struggle against racism and for equal opportunity in education.

[10] World War II was the initial spark in the struggle for human rights and equality in education. Nearly 500,000 African American soldiers served in the armed forces during the war, 80,000 of whom were overseas (Parkerson & Parkerson, 2001, pg. 49). Some estimates put the number of Mexican Americans in the armed forces at between 375,000 and 500,000. Mexican Americans are termed by some as the "most decorated ethnic group of World War II" – a distinction given to them no doubt by fact that Mexican Americans received more Congressional Medals of Honor, Silver Stars, and Bronze Stars than any other ethnic group (San Miguel, 1987, pg. 115). Along with the countless African Americans and Mexican Americans who contributed to the war effort on the homefront and after having served and died in cause against fascism, veterans returned to the same racism and subjugation they faced when they left.

Culture, Values and State Funding

In Texas, organizational and administrative power is wielded at the local level. Texas Education Code, Chapters 41, 42, and 46 provide school superintendents and school board trustees the legal authority to set their own tax rate, issue their own debt, and adopt their own budget. Some argue that local control represents power to citizens at the most basic and closest governmental level (Bailey et al., 1962; Beck & Murphy, 1998). Others (Cardenas, 1997) cite evidence of historical and institutional racism which could be used to argue for a more nationalized control of education. Elazar (1994) identifies three basic political subcultures in the United States – the individualistic, moralistic, and traditionalistic cultures. The state of Texas is an example of the traditionalistic political culture, although the individualistic political culture and its predominant values have begun to play an important role in the debate over school finance equity. Fowler (2000) contends that a major weakness of the traditionalistic culture is its resistance to change and democratic participation and its conduciveness to racism. Examining the sociopolitical context of the modern-day school finance system, namely what is termed "Robin Hood," and the struggle to make it more equitable, will provide further evidence of the extent to which the traditionalistic political culture is entrenched into the institutions, political structures, and societal psyche of Texas.

Maintenance of Traditionalism

Education policy and school finance reform first became a political issue at the onset of the Texas – Mexican War. Texas "revolutionaries" in 1836 declared that the Mexican government had "failed to establish any public system of education, although possessed of almost boundless resources" (Gammel cited in Walker & Casey, 1996). The

revolutionaries used this purported lack of educational opportunity as one of the major themes for inciting revolt, a strategy employed by political players to frame an issue so that it favors their goals and agenda. The Texas revolutionaries utilized what Kingdon (1995) has described as the most critical aspect of agenda setting – problem recognition. In this case, the revolutionaries adroitly at "recognized" this lack of educational opportunity, and astutely framed the issue for the Mexican land grantees.

The Mexican Constitution of 1824 did address public education, but left the responsibility of education to the states. The Mexican state of Coahuila y Tejas (modern day Texas) made provisions for education through land grants and municipal funds in 1827 and 1833, but land grantees themselves failed to put a high value on education. Instead, the newcomers were settling the land, establishing economic ties and fighting off Native American tribes in the area (Acuña, 1988). Individual communities, settlements and families saw to educational funding, a method soon employed by the newly formed Republic of Texas (Walker & Casey, 1996).

Mexico and Texas shared many commonalties during the late 1800s, the dominant parallel being that the culture of the elite existed on both sides of the border. A few elite Mexican families ruled politically and socially, promoting the values of a hierarchical, ordered society. These families operated and owned *haciendas* and although they did not import slaves as did their neighbors from the north, they did institutionalize a peonage system called *patronismo*. With the shifting of power from the Mexican government to Texas, this same form of traditionalistic, hierarchical power was promoted and institutionalized in every political, economic and social institution including education

(Acuña, 1988; Walker & Casey, 1996). These elite formed the power brokers in counties across Texas. They became what Fowler (2000) termed the "good ole boy" network.

With both the Constitution of 1836 for the Republic of Texas and the state constitution of 1845 that annexed Texas as a part of the United States, educational funding consisted of allotting counties land for generating revenue or space to educate a county's children. The state also dedicated its first state funds, albeit a very small amount, to be used by counties towards the establishment and maintenance of public schools. Walker & Casey (1996) contend that public interest in establishing and administering public schools was virtually non-existent. However, San Miguel (1987) shows how some Mexican parents struggled intensely to educate their children, founding their own schools, enrolling in friendly Catholic schools, or sending them to Mexican schools to be educated. Whichever argument is advocated it is clear that wealthy landowners, the vast majority of whom were white males, controlled the political and economic structures at Texas' inception (Acuña, 1988; San Miguel, 1987; Spring, 1997). This elite group of white men formed the state's school finance system, laying the groundwork for the on-going debate on school finance equity.

As more northerners migrated to Texas' urban areas, the dismal, nonexistent state of school funding would have to be changed. From 1850 to 1870, the number of schools nationwide rose from 87,000 to 142,000 (Cremin cited in Loveless, 1998). In the early to mid-1900s, the state attempted to address inequities between rural and urban schools adding funds to the Foundation Program and restructuring the system. With the end of World War II and the subsequent "baby boom," changes to the school funding became more crucial.

The first major reform since the annexation of the state was accomplished with the enactment in 1949 of the Gilmer-Aiken Act. This act did not provide for an equalized system in which all counties would have equal access to funds, but it did increase state funds to the highest levels in the history of the state. More importantly to county bosses and ranchers, this increase in state funds did not come with additional state policies, regulations or property taxes (Walker & Casey, 1996). Local control would allow decision-making on taxes and segregation to remain in the hands of elites and wealthy property owners.

For twenty-two years, 1949 to 1971, school finance policy did not change significantly. In the late 1960s, Governor John Connally received recommendations from a special commission called the Governor's Committee on Public Education. The Committee's recommendations published in 1968 called for a massive infusion of state funds and a restructuring of the system to incorporate an equalization feature and consolidation of school districts. Not surprisingly, the state did not implement the recommendations because they were deemed to be too controversial (Walker & Casey, 1996), leading civil rights groups to heighten their activism and effectiveness and seriously threaten to abandon old political loyalties. Groups like the Mexican American Youth Organization (MAYO), La Raza Unida Party and the National Association for the Advancement of Colored People (NAACP) organized "grass-roots" campaigns and set the stage for social change. This time period was marred with legislative inaction up until the late 1960s. The government's inaction and the groups' inability to place the issue on the governmental agenda during the decade (Kingdon, 1995) finallyled to the

courtroom. Filed in 1969 was the case that would trigger the first shot in a 25-year battle to equalize state funding for all districts.

Values, Power and Local Control

Since 1836, Texas' traditionalistic political culture has been dominated by economic and individualistic social values. The local control mantra embodies these values. Combined, they created the educational system while determining the mechanism for funding. As Fowler (2000) explained, individuals inevitably act to increase their power. They weigh the costs and benefits deviation in current policy, before determining whether or not to support the change. The traditionalistic power elite in Texas prevented a truly democratic system by relying on governmental policies to foster their continued domination. Rather than publicly advocating for an aristocratic system of government, local control framed the issue as individualism, freedom and government at the local level. As a result, inequity thrived in the form of the "haves" and "have-nots." Moreover, equality has always been perceived as an inferior value that runs counter to individualism (Fowler, 2000). The individualism value resonated with the first Texans and continued with their descendants. It has been immortalized in the history books with stories of the frontier cowboy and has thrived with the promotion of the individualistic value as the key to achieving economic prosperity.

Texas' values of self-interest and individualism have shaped the power structure and its control of public conflict. This structure characterinzed the education system and in turn the school finance structure in the decades leading up to the early 1970s. As noted by Bachrach and Baratz (1962) "the extent that a person or group – consciously or unconsciously – creates or reinforces barriers to the public airing of policy conflicts, that

person or group has power." Schattschneider (1960) further states that "organization is the mobilization of bias" and the resulting power structure can favor or deny public access to the issue. With local control as the mechanism for determining funding and equity, both the state government and local elites value individualism over equity. Consciously, the "good ole boy" network determines inequity of funding at the local level since property values are the source of school funds. Unconsciously, the individualistic value thrived as a core belief among the citizenry, becoming a chapter in the story of the "American Dream." The fact that certain groups of people namely African American and Mexican American school children – were treated inequitably did not sway public opinion. However interpreted, Texas' culture and values have fostered a power structure that deliberately maintains a racialized system (i.e. a system structured on racial terms) of inequitable school finance.

Political Action and Agenda Setting

The triggering event to social action occurred in 1969. By this time, local advocacy and interest groups had attempted to foster change at the local level. Student groups were gaining notoriety by organizing "walk-outs" and a third political party named La Raza Unida Party successfully placed some of it candidates on local school boards in South Texas (Acuña, 1988; Gutiérrez, 1998; San Miguel, 1987). But change was not occurring fast enough and by 1969, a community in San Antonio had become sufficiently dissatisfied with the system to mount a challenge. In that year, a group of parents in San Antonio called the Concerned Parents Association filed suit against San Antonio Independent School district, Edgewood Independent School District and five other school districts in Bexar County in Rodriguez v. San Antonio ISD (1971). The

parent group exhibited the "dissatisfaction" argued by Iannaconne and Lutz (1994), after fighting inequities at the local level for numerous years. The group was politically sophisticated, many of them having participated in civil rights marches and the Chicano Rights movement of the early 1960s. In addition, the group was cohesive, vocal and angry (Acuña, 1988; Gutiérrez, 1998; San Miguel, 1987; Spring, 1997).

The association took exception to the low quality of education afforded to students in their communities and it sought to remedy the situation by suing for the consolidation of the districts. Their premise was that districts could not change their status of low property wealth, but by forcing consolidation a greater combined property wealth would alleviate some of the financial stress being placed on the individual districts. But before the litigation was argued, a decision was made to shift the focus of the lawsuit. Dr. Jose Cardenas, superintendent of Edgewood ISD at the time, and Gregory Luna, attorney for San Antonio ISD, discussed the lawsuit's goal over the course of many weeks. Cardenas' contention was that combining a few poor school districts would only create one big, poor school district. After consulting with Raul Rivera, a local attorney with a strong constitutional law background, the state was named as the defendant and two of the seven districts initially named as defendants, San Antonio ISD and Edgewood ISD, both with majority-Mexican American enrollments, actually aided in the plaintiff's case with expert testimony and extensive trial preparation. Both San Antonio ISD and Edgewood ISD endured negative repercussions from the state-level power elite, and among districts in the same predicament for their choice (Cardenas, 1997; Farr & Trachtenberg, 1999; Walker & Casey, 1996).

Policy Reform through the Courts

Rodriguez v. San Antonio

In the historic Rodriguez v. San Antonio ISD (1971), a U.S. District Court declared the Texas school finance system unconstitutional. The court held that the state's method of relying heavily on local property wealth discriminated against children living in poor school districts (Cardenas, 1997; Farr & Trachtenberg, 1999; Hobby & Walker, 1991; Walker & Casey, 1996). The case followed the wake of Serrano v. Priest (1971), a California state court case that challenged the state's school funding system (Dayton, 2000). As stated by Dayton (2000), Serrano v. Priest (1971) was the "first case to establish a judicially manageable standard for courts in addressing ineqities in school funding." However, Rodriguez v. San Antonio ISD (1971) would occupy the attention of the Texas Legislature and courts for the next three decades. As stated by Valencia (2002a, pgs. 19-20), the case was " "unique in that it is the first, and only, case of school finance equity to be adjudicated before the United States Supreme Court." The case also was groundbreaking in the choice of legal strategies utilized by the plaintiffs. As stated by Farr and Trachtenberg (1999), the plaintiffs used the same race-based equal protection arguments by "arguing that the property-tax-based system of education finance in Texas discriminated on the basis of wealth," (pg. 622). The three panel judge agreed with the arguments.

On appeal, the U.S. Supreme Court heard arguments and in 1973, the Court overturned the lower court decision. The Court stated that the Texas school finance system was not unconstitutional, it referred the case back to the state for remediation and further reiterated that education was not a fundamental right protected under the U.S. constitution. In Rodriguez v. San Antonio (1973), Justice Powell wrote the majority

opinion for the 5-4 decision. He noted that although disparities between school districts did exist, the state was attempting to remedy the situation by creating a minimum foundation program. As he stated:

> The District Court's opinion does not reflect the novelty and complexity of the constitutional questions posed by appellees' challenge to Texas's system of school financing. In concluding that strict judicial scrutiny was required, that court relied on decisions dealing with the rights of indigents to equal treatment in the criminal trail and appellate processes, and on cases disapproving wealth restrictions on the right to vote. The cases, the District Court concluded, established wealth as a suspect classification. Finding that the local property tax system discrimated on the basis of wealth, it regarded those precedents as controlling. It then reasoned…that there is a fundamental right to education, and that absent some compelling state justification, the Texas system could not stand. (pgs. 17-18)

Another of the concurring opinions noted that the issue of funding schools was best left to "political" solutions. In writing one of the dissenting opinions Justice Thurgood Marshall utilized language from the landmark Brown v. Board of Education (1954) case and stated:

> I, for one, am unsatisfied with the hope of an ultimate 'political' solution sometime in the indefinite future while, in the meantime, countless children unjustifiably receive inferior educations that "may affect their hearts and minds in a way unlikely ever to be undone." (pgs. 71-72)

He further noted the vital role that local property value plays in funding local schools and emphasized a point that would be used in future court cases. He stated (pg. 74), "Even though the voters of two Texas districts may be willing to make the same tax effort, the results for the district will be substantially different if one is property rich, while the other is property poor." Even though there is, as stated by Justice Marshall (pg. 82), "no escaping the conclusion that the local property tax which dependent upon taxable district property wealth is an essential feature of the Texas scheme of financing public education," the majority and the state of Texas:

> [R]eject the suggestion that the quality of education in any particular district is determined by money…In their view, there is simply no denial of equal educational opportunity to any Texas school children as a result of the widely vaying per-pupil spending power provided districts under the current financing scheme. (pg. 83).

Interest groups, namely parent coalitions like the Rodriguez plaintiffs that first filed the suit, civil rights activists and policy specialists were clearly encouraged by the District Court's initial ruling. Although upset with the Supreme Court ruling, the Court's referral for remediation encouraged the plaintiffs. School finance reform had managed to gain momentum on one of what Kingdon (1995) called, process streams for agenda setting. By placing the problem on the governmental agenda through the courts, inequity in school finance moved to the forefront. Although interest groups and litigation forced policy makers to notice, it had not convinced them to act. In the meantime, proponents attempted to place the issue higher on the governmental policy agenda in an effort to bypass barriers in the political or policy stream of the process.

Many reformists feared that just keeping the issue on the governmental agenda would be a struggle in and of itself. Their fears were validated, as the legislature failed to address the problems of school finance inequities in the 1975, 1977, 1979, 1981, and 1983 legislative sessions (Farr & Trachtenberg, 1999; Hobby & Walker, 1991). The legislature practiced what Kingdon (1995) called the "fading of problems" and dealt with the issue piecemeal, one year allocating additional funds to local school districts, while citing the decrease of oil and gas revenues, as reasons for the inability to restructure the school finance system in remaining years (Walker & Casey, 1996).

Advocates of school finance equity would not let the issue die. Groups such as the Intercultural Developmental Research Association (IDRA), now led by Dr. Jose Cardenas, the Mexican American Legal Defense and Educational Fund (MALDEF), the National Urban Coalition, the Ford Foundation, and the Carnegie Corporation maintain the issue on the governmental policy agenda by offering expertise, financial support, and lobbying efforts. Several groups formulated strategies for addressing legislative inaction and to provide national networking opportunities. In the process, new advocacy groups emerged, aided by the more established organizations. IDRA took a leadership role in assisting advocacy groups that specifically fought for equal educational opportunity. Prior to this time, independent entities such as the Texas Association of Mexican American Educators, Texas Association of Mexican American School Board Members, Texas Association of Black Educators, and the Equity Center (formerly the IDRA Tax Project) did not exist (Cardenas, 1997).

These interest groups continued to pressure the governor, legislature and bureaucratic agencies in an effort to keep the issue on the governmental policy agenda. It

eventually paid dividends, but almost 25 years passed before the problem, politics and policy process streams aligned, culminating in a new school finance policy of equalization at the district level (Cardenas, 1997; Clark, 2001; Farr & Trachtenberg, 1999). The overdue reform brought a huge influx of funds for some of the poorest school districts (Montgomery, 2003).

The Edgewood Cases

Lobbying efforts, civil rights protests, and public testimony presented to legislative committees and pleas to the media failed to budge the traditionalistic culture of Texas. Rather, it took litigation to force legislative action (Cardenas, 1997; Farr & Trachtenberg, 1999; Hobby & Walker, 1991; San Miguel, 1982, 1987; San Miguel & Valencia, 1998; Valencia, 2002b). When forced to re-write Texas education code, legislators still relied on property value as the primary determinant of state funding and school finance policy. The landmark case that provided some impetus for shifting from unequalized local enrichment to "equalization" was Edgewood ISD v. Kirby (1989).[11]

Edgewood I

The same plaintiffs that argued their case at the federal level also lead the fight at the state level. Their case went to trial in January 1987 and closing arguments were held in April of that year (Walker, 1988; Walker & Moak, 1988). The Edgewood case had three more separate incarnations and was litigated in district, appellate and the Texas Supreme Court over eight years. Edgewood ISD, the Mexican American Legal and Educational Fund (MALDEF) and the newly formed Equity Center provided leadership on legal and political fronts. The Equity Center, a nonprofit organization that was formed

[11] Edgewood Independent School District, et al. v. Kirby, 777 S.W.2d 391 (1989) was also known as and will be referred hereinafter as Edgewood I.

to act as technical analysis arm of the plaintiffs' case, lobbied legislators and organized rural, poor school districts (Farr & Trachtenberg, 1999).

MALDEF and Equity Center leadership differed in their approach. The original Edgewood plaintiffs, and other majority-Mexican American school districts and leadership, wanted a race-based argument, while the Equity Center supporters and the majority-White rural districts it represented, preferred to focus on wealth-based discrimination. As noted by Farr and Trachtenberg (1999):

> The fact that the case had two distinct groups of plaintiffs betrayed an underlying ideological division over what legal route would best produce equitable funding for Texas schools…MALDEF and his (Al Kauffmann, lead attorney for the group) original plaintiff group hoped to pursue an "equal protection" attack on the funding system. MALDEF, as an advocacy group for Mexican-Americans, favored the 'equal protection' analysis because it was more conducive to an ethnic-discrimination argument. For political reasons…the Equity Center…preferred to concentrate on the "efficient system" provision of the Texas Constitution and to use the equal-protection argument in the context of wealth instead of race. (pg. 631)

MALDEF presented a race-based argument, but the Equity Center's "plan to use wealth-based rather than race-based equal protection was emphasized" in the trial, (pg. 631). In June of 1987, Judge Harley Clark ruled in favor of the plaintiffs finding that the state's finance system was unconstitutional and inefficient and that education was indeed a fundamental right. Farr and Trachtenberg (1999, pg. 633) write, "The State's only victory

came at the expense of Kauffman's race-based equal protection claim. On every other point, the plaintiffs were victorious."

The state appealed and the appellate court reversed the district courts' finding. Finally, in October 1989 the Texas Supreme Court once again declared the Texas school finance system unconstitutional. In writing the majority opinion, Justice Oscar Mauzy stated:

> The 100 poorest districts had an average tax rate of 74.5 cents and spent an average of $2,978 per student. The 100 wealthiest districts had an average tax rate of 47 cents and spent an average of $7,233 per student…Property-poor districts are trapped in a cycle of poverty from which there is no opportunity to free themselves. Because of their inadequate tax base, they must tax at significantly higher rates in order to meet minimum requirements for accreditation; yet their educational programs are typically inferior…We hold that the state's school financing system is neither financially efficient nor efficient in the sense of providing for a "general diffusion of knowledge"…There must be a direct and close correlation between a district's tax effort and the educational resources available to it; in other words, districts must be afforded a substantially equal access to similar revenues per pupil at similar levels of tax effort. (pgs. 3-12)

The Supreme Court focused on the efficiency provision as had the district court and struck down the appellate court's finding that school finance policy and funding free, public schools was merely a "political" issue. The Supreme Court gave the Texas Legislature until May 1990 to create a constitutional system (Hobby & Walker, 1991; Walker, 1988; Walker & Moak, 1988; Yudof, 1991).

Farr and Trachtenberg's (1999) interviews of key players in the Rodriguez v. San Antonio (1973) case, provide some illuminating issues regarding the abandonment of the equal protection argument. The authors interviewed Craig Foster, head of the Equity Center, Al Kauffman, lead attorney for MALDEF and Albert Cortez, research associate for the Intercultural Development and Research Association (IDRA). They found that the equal protection argument was dropped as a legal strategy because it is "much less 'crisp' and clear-cut", (pg. 642). Kauffman was "disappointed that the supreme court completely ignored the equal protection claim" and had "envisioned using the equal protection argument for Mexican-Americans as a group (much like federal voting rights arguments had been used)," (pg. 643). They quote Albert Cortez saying:

> 'We looked at the data and we saw that the Mexican-American population around the state was disproportionately concentrated in low-wealth school systems…The difficulty was that there were also some in major urban areas and in above-average wealth districts. That kind of complicated the situation.' (pgs. 642-643)

Foster's organization primarily represented poor, majority Anglo districts. He found that "if school-finance reform was defined as a Mexican-American issue, he would never be able to get the Legislature on board," (pg. 643). A few of Foster's quotes provided by Farr and Trachtenberg (1999) are more direct. They quote Foster stating:

> 'The reason for [bringing in the plaintiff-intervenors] (the Equity Center group) was that MALDEF was unwilling to give up the ethic component even though David Long from California [attorney in Serrano v. Priest] and everybody that had ever done a school-finance lawsuit said that you don't really get anything out

of that if you have an inequitable system…It is best to just go with inequity for everybody and not try to make it an ethnic or racial thing.' (pgs. 643-6444)

Kauffman was far more conflicted in his interviews with the authors. He regrets not pushing the equal protection strategy and states:

'There is no doubt that having the Mexican-American issue in there would have made it tough to deal with the Legislature…To this day, I still feel there was discrimination…The main reason this (type of system) was allowed to go on was discrimination against Mexican-Americans.' (pg. 643)

Edgewood II

The Texas Legislature passed Senate Bill 1 in June 1990, a month after the deadline issued by the Texas Supreme Court. Walker and Casey (1996, pg. 15) found that the bill allowed the state to phase in a new system over the next five years, added a minimal facilities component to the foundation program, allowed for a recalculation of the funding formulas, and enacted accountability reforms. The biggest change to the system was the 95% rule in which 95% of students statewide would have access to equitable funding. The remaining 5% of students – and the districts they attended school in – would not need to change their operations. Farr and Trachtenberg (1999) noted:

Allowing every child in Texas to attend a school like Alamo Heights (a property-wealthy school district in San Antonio) was not a viable option…The "ninety-five" percent plan offered much greater political stability than the absolute equalization approach. By ensuring up front that the wealthiest districts' resources would not be tapped by Senate Bill 1, a huge political burden was lifted from the Capitol. Needless to say, the 132 riches school districts in Texas (which would

constitute the immunized top five percent) carried formidable political clout. (pg. 649)

Edgewood plaintiffs immediately challenged Senate Bill 1. Judge Scott McCown heard Edgewood v. Kirby (1991)[12] in district court and found in favor of the plaintiffs, ruling that Senate Bill 1 did not provide equal access to equal funding (Farr & Trachtenberg, 1999; Hobby & Walker, 1991; Walker, 1990; Walker & Casey, 1996; Yudof, 1991). However, Judge McCown allowed the Supreme Court's deadline to be disregarded. The infuriated plaintiffs petitioned the high court directly. The Supreme Court agreed with the district court that Senate Bill 1 failed to meet the mandate of Edgewood I and the system remained unconstitutional. Many in Austin at that time believed the Court was prescribing a system of recapture or redistribution of wealth. With the Texas Legislature in session at the time of the ruling, many interpretations circulated around the Capitol. Much confusion stemmed from the use of "substantially equal" in the Edgewood I ruling. What did "substantially" mean? Wasn't 95% "substantially equal"?

The two chambers of the Texas Legislature began floating bills addressing the issue of "recapture." The Senate's version included the "recapture" of regional tax dollars while the House plan advocated "tax base consolidation," (Farr & Trachtenberg, 1999; Walker & Casey, 1996). The plaintiff-intervenors led by the Equity Center districts successfully filed a motion for a rehearing on the issue of recapture. This group of plaintiffs wanted a specific ruling on whether the state could redistribute funds and the rehearing granted to them came to be known as Edgewood IIa.

[12] Edgewood Independent School District, et al. v. Kirby, 804 S.W.2d 491 (1991) is known and will referred to hereinafter as Edgewood II.

The political climate during Edgewood II's adjudication ignited a firestorm of controversy. Most people believed the Court actively advocated a recapture or redistribution method of financing public schools. The motion to rehear the case was used by the Court to "clarify" their position on this issue. Farr and Trachtenberg write (1999, pg. 654), "In an astonishing about-face, the majority seemed to amend its decision to allow some local unequalized enrichment revenues" while also striking down the constitutionality of recapture. They also note that after Edgewood II and IIa the Legislature was limited in its options. The state could, "enact an entirely new tax system, consolidate school districts, design a constitutional scheme to recapture local tax revenue, or cap spending by wealthy districts," (pg. 660). In the end, Senate Bill 351 passed the Legislature and was signed by newly-elected Governor Ann Richards.

Edgewood III

The House plan to have a "tax-base consolidation" passed under the guise of Senate Bill 351 and became law in the spring of 1991. It restructured the school finance system by creating 188 County Education Districts (CEDs) to which taxing authority would be granted. The school districts were assigned to one of the taxing authorities which collected taxes and distributed the funds. One month after the governor signed the bill into law, three groups of rich school districts sued the state. Carrollton-Farmer's Branch Independent School District v. Edgewood Independent School District (1992)[13] claimed that this method of financing constituted a state-wide property tax, a tax that is unconstitutional under the Texas constitution. MALDEF and Equity Center plaintiffs defended Senate Bill 351 and Judge McCown found it to be constitutional in August

[13] Carrollton-Farmer's Branch Independent School District v. Edgewood Indpendent School District, 826 S.W.2d 489 (1992) is known and will be referred to hereinafter as Edgewood III.

1991 (Farr & Trachtenberg, 1999; Walker & Casey, 1996). In January 1992, the Texas Supreme Court overturned Judge McCowan's district court ruling. As noted by Walker and Casey (1996, pg. 18), the Supreme Court "held that the CED tax was unconstitutional because: (1) school district taxes were levied without local voter approval as required by Article VII, Section 3; and (2) the tax constituted a state property tax specifically prohibited by Article VIII, Section 1-e." The Supreme Court delayed the institution of its order until June 1993, thus allowing the state to collect the CED tax in the school years 1991-92 and 1992-93.

The Edgewood III decision opined by Justice (and future Texas State Attorney General and U.S. Senator) John Cornyn significantly redefined "efficiency" and rejected a notion of "equity." As stated by Farr and Trachtenberg (1999):

> Justice Cornyn, who would later write the majority opinion in Edgewood IV…injected language and ideas into the debate that had been largely hidden in the shadows of the prior supreme court opinions. Some of Cornyn's ideas, which included a significant redefinition of "efficiency" and rejection of the importance of equity, would prove to have important consequences for Texas schoolchildren. (pg. 664)

Edgewood IV

Attempting to meet the order of the Supreme Court, the Texas Legislature passed three constitutional amendments to go before the voters in May 1993. The first was a "Fair Share Plan" that would have allowed for limited recapture or redistribution of wealth for the first time in the state's history (Walker & Casey, 1996). Farr and Trachtenberg (1999) state:

> This proposal would have required Texas's 111 richest school districts to surrender a portion of their local tax revenue to the state, which would then funnel the money through the Teacher Retirement system to aid poor districts. Because the constitution had been interpreted to prohibit tax money collected in one school district form being spent in another, the plan was drafted in the form of a constitutional amendment to circumvent this restriction. (pg. 673)

The amendment, named Proposition One, soon became known by its opponents as the "Robin Hood" amendment. The Republican Party of Texas formed an organization called the "Citizens to Stop "Robin Hood" Taxes," (Farr & Trachtenberg, 1999, pg. 676). The public overwhelmingly defeated Proposition One leaving the Legislature scrambling to meet the June 1 deadline set by the court (Walker & Casey, 1996).

With the clock ticking, the Legislature passed Senate Bill 7 which provided rich districts five choices in reducing their tax base. The choices included: (1) consolidation with another district that the district of the district's choice (the House plan); (2) annexation of part of the rich district's land to another property-poor district (the Senate plan); (3) purchasing attendance credits from another district, making rich districts poorer; (4) contracting to educate non-resident students, making the rich districts less wealthy; and (5) tax-base consolidation (the old Senate Bill 351 plan). Districts would be funded up to a $205,000 property value per student but were no longer allowed to exceed $280,000 in property value per student. This "gap" would come back to haunt the Legislature and Supreme Court in the future. If a district exceeded $280,000, they had to choose one of the five options to "share their wealth," (Farr & Trachtenberg, 1999; Walker & Casey, 1996).

In addition, Senate Bill 7 allowed some of the wealth to be retained in the rich districts. A "hold harmless" provision was added, allowing districts to maintain their wealth for the next three years so the funding decrease could be phased in over multiple years. The bill also added $1.1 billion to the foundation program to provide more funding to property-poor districts (Farr & Trachtenberg, 1999; Walker & Casey, 1996). Finally, Senate Bill 7 created a new accountability system that established "a system of assessment and accreditation for school districts to measure their progress in reaching seven educational goals…the regime grades campuses as either exemplary, recognized, acceptable, or low-performing, based on standardized test scores, attendance, and dropout rates," (Farr & Trachtenberg, 1999, pgs. 685-686).

The MALDEF and Equity Center plaintiffs wasted no time in filing Edgewood v. Meno (1995).[14] They objected to the inadequacy of the state appropriation of $1.1 billion, the "gap" between rich and poor districts that the Senate Bill 7 accepted, and the built in "lag" in funding that permitted the state to delay increases in funding to the following biennium. The case was heard by Judge McCown in December 1993. He upheld the constitutionality of the bill but found that the system did not provide a funding mechanism for financing capital outlay or the construction of schools via general obligation bond (Farr & Trachtenberg, 1999; Walker & Casey, 1996). In his Edgewood IV district court opinion, Judge McCown states:

> As the trial judge who has presided over the review of S.B. 1, S.B. 351, and now S.B. 7, however, I am convinced that S.B. 7 is constitutional and perhaps our last hope for establishing the system of public education our forbearers believed

[14] Edgewood Independent School District, et al. v. Meno, 893 S.W.2d 450 (1995) is also known and will be referred to hereinafter as Edgewood IV.

> essential to the preservation of our liberties and our rights. S.B. 7 does not complete our work. The state still has no equitable method of financing capital expenditures. I have therefore made necessary orders regarding capital expenditures. (pg. 1)

As a legal remedy to the lack of funding for facilities and in response to the inability of poor districts to sell bonds for construction of facilities, Judge McCown states:

> Plaintiffs are entitled to further injunctive relief to ensure compliance with this court's 1987 order relating to facilities. The surest way to enforce the order is simply to provide that there will be no new debt at unequalized tax rates for anyone until there is an equitable system for everyone. (pg. 75)

Appealed directly to the Texas Supreme Court, Senate Bill 7 was ruled constitutional on January 30, 1995. Barring minor changes to the system in terms of foundation, facilities and guaranteed yield funding, the school finance system has remained relatively the same since then (Cardenas, 1997; San Miguel & Valencia, 1998; Valencia, 2002b; Walker & Casey, 1996). In the Edgewood IV Texas Supreme Court majority opinion, Justice Cornyn "dramatically altered the constitutional landscape" by introducing significantly different interpretations of efficiency and equity than had previously been used in the Edgewood cases (Farr & Trachtenberg, 1999, pg. 691). As he states in the opinion:

> It is apparent from the Court's opinions that we have recognized that an efficient system does not require equality of access to revenue at all levels…The district court viewed efficiency as synonymous with equity, meaning that districts must have substantially equal revenue for substantially equal tax effort *at all levels of funding*.

> This interpretation ignores our holding in Edgewood II that unequalized local supplementation is not constitutionally prohibited. (pg. 12)

Thus, Justice Cornyn is stating that the "gap" generated by the finance system is constitutional and that full equality is too expensive and not a viable option for the state. He further iterates that:

> In Senate Bill 7, the Legislature equates the provision of a "general diffusion of knowledge" with the provision of an accredited education. The accountability regime set forth in Chapter 35, we conclude, meets the Legislature's constitutional obligation to provide suitably for a general diffusion of knowledge. (pgs. 12-13)

Justice Spector wrote the sole dissenting opinion and "lambasted Cornyn for incorporating adequacy questions into the established constitutional standards, stressing that 'the 'general diffusion of knowledge' has never been a part of this debate" and criticized the court "for the way it allowed the adequacy issues into the debate," (Farr & Trachtenberg, 1999, pg. 698). Cornyn successfully shifted the definition of efficiency and tied it to the rigid accountability system that set up the future debate on adequacy. On the issue of facilities, Cornyn also found that "the undisputed evidence is that all districts can presently meet their operations and facilities needs with funding provided by Tier 2" and that if "the cost of providing a general diffusion of knowledge rises to the point that a district cannot meet its operations and facilities needs" (pg. 49) then the system could be deemed unconstitutional. The Court overturned the ban on the issuance of debt but also warned that "it appears that this point is near," (pg. 49). The legislature reacted to this language by first instituting a facilities grant program then by creating the Instructional

Facilities Allotment Program in 1997 (Clark, 2001; Walker & Casey, 1996) and the Existing Debt Allotment (EDA) in 1999 (Clark, 2001).

West Orange-Cove and the Texas School Finance Project

Over the past five years, the school finance system created by Edgewood IV court decision has been unchanged despite continued litigation and political maneuvering. The next challenge in this long-running dynamic occurred on June 28, 2001. Four property-wealthy districts filed a suit in Travis County district court contending that "the public school finance system has evolved into an impermissible state ad valorem tax prohibited by the Texas constitution, Article VIII, Section 1-e…,"(Thompson, 2003, pg. 1). The districts' lead attorney, David Thompson, argued that his clients were forced to tax at or near the $1.50 tax rate limit in order to provide an adequate educational program to their students. He argued that this fact deprived the districts of "meaningful discretion" in setting their own tax rates as provided by the Supreme Court in Edgewood IV.

The district court, presided over once again by Scott McCowan, dismissed the case. In the West Orange-Cove ISD v. Nelson (2001) opinion filed July 11, 2001, the judge stated:

> A single number decides this case – the percentage of districts that must tax at the cap of $1.50. The plaintiffs do not and cannot state a claim upon which relief can be granted because a constitutionally insignificant number of districts, if any at all, are required to tax at the cap of $1.50. The constitutional question is not how many are at the cap, but how many must be at the cap to provide an accredited education.

McCown found that not enough districts were required to tax at the cap and that in order to argue on these grounds, a district must show how they are forced to tax at the this limit and how the resulting monies insufficiently provide for an adequate education. In a footnote of his opinion (pg. 6), McCowan reiterates that it is not the function of the court to determine the cost of an education, but recommends that:

> State defendants would undoubtedly want to conduct a forensic audit of the cost of education in the districts, including administrative overhead and such things as, heaven forbid, football. Contrary to popular belief, though perhaps it should be, football is not protected by the constitution or required by law.

He also states that "if the Legislature has not spent enough, then the citizens will say so in their own time and order increased funding for education form the voting booth," (pgs. 16-17).

After the Third Court of Appeals also dismissed the case, it was appealed to the Supreme Court. In the majority decision of West Orange-Cove case (2003), Justice Nathan Hecht found that the lower courts erred in dismissing the case and remanded it back to the district court for further proceedings. Thompson's (2003, pg. 1) summary states that the court reviewed all the major issues from the previous four Edgewood cases and concluded that "none of the discussion was favorable to the current system." The majority opinion commented on unequalized enrichment, the relation between state funding and an "adequate" academic program, and the definition of a "meaningful local discretion" of setting local tax rates. The state district court has set a July 26, 2004, court date for hearing the complaint and three weeks has been set aside for arguments and hearing of evidence.

Two other groups of litigants have also filed complaints. Over 200 Tier II school districts joined the lawsuit as plaintiff-intervenors. The group took the name of the first district named in the lawsuit – Alvarado Independent School District. The Alvarado Plaintiffs (2004) argue that:

1) That the Edgewood equity standards must be achieved, improved and then preserved.
2) That the present level of state funding of public schools is inadequate to achieve the legislature's stated goals.
3) That the local school districts must always have sufficient local tax capacity to insure true local control of our school districts and to meet changing community expectations.

They state that the "fact is that the legislature has always back-tracked on the Edgewood equity standards" and has "never closed the gap to $600 promised in Edgewood IV, and the gap has now widened to over $1,000…Now the legislature has failed to continue even the inadequate level of IFA funding for low-wealth districts." The primary goal of this group to argue for Tier II school districts and participate in the trial filed on behalf of property-wealthy school districts.

Another group of school districts filed a claim as defense-intervenors. Led by the Edgewood ISD in San Antonio, the district, along with its legal counsel, the Mexican American Legal and Educational Fund (MALDEF), consists of fifteen other school districts from South Texas and asks the court to preserve the current school finance system. Eight of the fifteen districts are from the Rio Grande Valley region of Texas and

are members of the STAS. In here brief to the district court, lead MALDEF attorney, Nina Perales (pg. 3)[15] states:

> The Edgewood Intervenors seek to hold the State accountable for: failing to suitably provide for facilities financing in an equitable and efficient manner; failing to provide adequate financing for the education of special needs children; failing to adequately and suitably provide for a general diffusion of knowledge in an equitable and efficient manner; and failing to equitably provide local discretion to poor districts to determine their level of local educational enrichment.

The complaint further argues that the equalization measures implemented by the state have been successful in alleviating much of the historical inequity and concludes that the state's negligence in appropriating increased funds has brought hardship to districts. It further states (pg. 19):

> Because of Edgewood Intervenors' interest in defending and furthering equalization measures, Edgewood Intervenors will resist any relief sought to weaken or erode those measures. Plaintiffs also seek to maintain unlimited, unequalized access to revenue in Tier III financing (facilities) for wealthy districts, which Edgewood Intervenors specifically challenge.

The Edgewood Intervenors defend the current system but do call for improvements by evoking the history of school finance and the long road to achieving the current system, but do ask that the court not render the system unconstitutional.

Shortly after the adjourning of the 78th Legislative session in May 2003, the legislative leadership took the advice of Scott McCown and established a group of

[15] The brief may be accessed at www.equitycenter.org by clicking on the link to Edgewood Intervenors.

committees to study the cost of education and propose solutions to the "school finance crisis." The governor, lieutenant governor and Speaker of the House established the Texas School Finance Project which was spearheaded by two, overarching, select committees. The first was the Joint Select Committee on Public School Finance, made up of six Senate members, six House members (including the two co-chairs), and four citizens appointed by the governor.

The second select committee established was the House Select Committee on Public School Finance, which was made up of twenty-nine members of the Texas House and chaired by Ken Grusendorf, Republican from Arlington and vice-chaired by Vilma Luna, Democrat from Corpus Christi. The House Select committee has nine subcommittees with responsibilities for tax issues, completion and dropouts, cost adjustments, facilities, incentives and accountability, governance, alternatives, high school, and benefits/compensation. In addition, the Project has two research teams conducting studies in the cost of education, adequacy, "best" practices, facilities, geographic cost variations, and taxing options. The three working groups are based in the Texas Senate and study issues concerning tax and revenue, funding methodology and distribution, and general education reform issues. Combined the two select legislative committees, nine subcommittees, three working groups and two research teams are studying tax, cost and accountability issues in a coordinated effort to reform the school finance system.[16] Their findings and proposals are to be considered at a proposed special session on school finance in April 2004.

[16] The Texas School Finance Project has information at the following website: http://www.capitol.state.tx.us/psf/capitol.htm.

CHAPTER III: METHODOLOGY

Introduction

Wolcott (2001, pg. 93) states, "Method refers to underlying principles of inquiry rather than to specific techniques." Although I discuss the techniques I employed to gather, analyze and present data later in this chapter, in this first section I refer to Wolcott's assertion and lay out the principles that provide the foundation for my research. Because I conducted a qualitative study, I maintain as do Lincoln and Guba (1985, pg. 39) that qualitative or naturalistic inquiry requires the utilization of the researcher's analytic skill, interpretive talent, personal experience and self-identity as the instrument to be used in research "as opposed to paper-and-pencil or brass instruments." Utilizing what Pizarro (1998) terms a "Chicano epistemology," I will discuss my intentions in completing this study as a social justice project. Additionally, I heed the advice of Kincheloe and McLaren (2002) as they describe how the point for critical researchers is not to "shed all worldly affiliations but to identify them and understand their impact on the ways they approach a social and educational phenomenon" (pg. 101). In this introduction I attempt to identify and understand my "worldly affiliations" as well as provide a rationale for my approach.

My ontological inclinations were founded in the public school system. I hated the first day of school as a child. My last name starting with the letter "A" almost assured that I would be the first one called as the teacher accounted for students present. Typically, the teacher couldn't get past the pronunciation of my first name (Enrique) before she/he mispronounced my last (Alemán). It wasn't the fact that my name was mispronounced, people do it today as do I with other's names, but the manner in which

they asked made me feel like I ***had*** to change it, Americanize it, make it easier for them. Although seemingly a benign mistake, I was thrust upon what Delgado Bernal (2002) terms the Eurocentric epistemological perspective, in which my culture, history, identity was not the "right" one. Solórzano (1998) and Villalpando (in press) describe these comments or actions as "microagressions" for the way that people of color are made to feel inferior although sometimes inadvertently. "Is this the name you would like to go by?" "Do you prefer a nick-name?" "What does your name mean in English (so that maybe I can call you that)?" I had to change it to become safer, more acceptable. Whether in kindergarten or my senior year, I had to be willing to play the game if I was to "succeed."

In the preface to the first edition of *Borderlands/La Frontera: The New Mestiza*, Gloria Anzaldúa (1999) states,

> I am a border woman. I grew up between two cultures, the Mexican (with a heavy Indian influence) and the Anglo (as a member of a colonized people in our own territory). I have been straddling that *tejas*-Mexican border, and others, all my life. It's not a comfortable territory to live in, this place of contradictions. Hatred, anger and exploitation are the prominent features of this landscape.

I grew up on the cusp of the literal in-between space (Brownsville, Texas) that Anzaldúa speaks of, not quite in the Rio Grande Valley of Texas but close enough to it to be considered "from the Valley." However, the metaphorical space she describes "between two cultures" is a place I know well. I did experience the "hatred, anger and exploitation" that is common to many South Texas towns and "straddled" the Chicano

and American (i.e. White) identity for much of my life. My straddling of cultures is evident by the manner in which I undertook my previous career track, ultimately refused to deny my heritage and culture, and in the way I have sought to reclaim my identity and purpose. The territory that I now choose to live in is ontologically comfortable. It is one that views race and racism at the center of society's institutions, practices, and discourse and is situated in a Latino pan-ethnicity described by Nuñez (1999) and Chicano way of knowing described by Pizarro (1998). It informs this dissertation's methodology and elucidates the selection of its methodological techniques.

My epistemology is borne from my experience of a racist society and an assimilationist career track. The process by which I experience reality is a direct result of "straddling" two cultures. I was once a CIA officer, walking in and out of the headquarters building in Langley, Virginia, and within the bowels of the American Embassy in Moscow, Russia. I was probably the only South Texas, Chicano in Moscow during the winter of 1994. The opportunity was the result of an affirmative action program that provided relatively few opportunities in an organization not known for its diversity or its democratic or human rights principles. I adapted, straddled the fence, and changed my name on the first day of work (even though you would think an organization with operations all around the world would welcome "different" sounding names). Today, I'm an employee with the state's Texas Education Agency. In speaking with superintendents from all around the state, its ironic that I still have to contend with, "How do you pronounce your name? Is that what you go by? Oh, whatever." The majority of my career experience has been relegated to operating and "succeeding" in white-dominated organizations. I was not operating under a "critical raced-gendered

epistemology" described by Delgado Bernal (2002, pg. 116), in which my cultural and racial experiences were validated and valued. In most cases, I adapted to the majoritarian perspective.

My childhood and early adult experiences as a Mexican American growing up in South Texas, born to parents who were migrant farmworkers, raised in tightly-knit, blue-collar family encompasses my identity. I've existed in the "in between world" in which many Mexican Americans are forced to live. This shapes my understanding of race, politics and "success." As a researcher I believe that contextual, historical and experiential knowledge is essential to addressing problems affecting Mexican American school children, educational leaders and communities. Kincheloe and McLaren (2002, pg. 106) state that "critical researchers enter into an investigation with their assumptions on the table, so no one is confused concerning the epistemological and political baggage they bring with them to the research site." I have attempted to do this adequately prior to describing the methodological framework from which I conduct this study.

Conceptual Framework

The conceptual, methodological framework for this study is qualitative – hermeneutic in nature with a strong foundation in a type of orientational inquiry described by Patton (1990). As he describes it (pgs. 84-85),

> Hermeneutic philosophy…is the study of interpretive understanding, or meaning, with special attention to context and original purpose…Hermeneutics researchers use qualitative methods to establish context and meaning for what people do.

Kincheloe and McLaren (2002, pg. 102) assert that, "Critical hermeneutics is more comfortable with interpretive approaches that assume that the meaning of human experience can never be fully disclosed – neither to the researcher nor to the human that experienced it." Both agree that phenomenon can not be investigated in space devoid of context and perspective and without the bias and subjectivities of the researcher. Recognizing the importance of grounded theory (Lincoln & Guba, 1985, pg. 41) and emphatic neutrality (Patton, 1990, pg. 54-58), this study allows for the emergence of multiple realities and recognizes that absolute, value-free objectivity and perspective is impossible.

Utilizing the orientational inquiry described by Patton (1990) provides a sense of purpose and allows my commitment to social justice to be manifested with the completion of the study. Concerns regarding future job marketability, publish ability and academic relevance and legitimacy, were considered prior to selecting a methodological framework for the study. The opportunity to contribute to a specialized niche in the literature as well as to provide insight into real-world problems affecting marginalized communities convinced me of the importance and relevance of basing my research on a specific orientation. Patton cautions researchers who take hermeneutics one step further towards what he calls orientational inquiry. He states (1990, pg. 86-87),

> Orientational qualitative inquiry begins with an explicit theoretical or ideological perspective that determines what variables and concepts are most important and how the findings will be interpreted…Within each of these theoretical or ideological orientations one can gather qualitative data. But the focus of inquiry is determined by the framework within which one

> is operating, and the findings are interpreted and given meaning from the perspective of that preordinate theory…Such inquiry is aimed at confirmation and elucidation rather than discovery.

Patton's assertions privilege his traditionalist notions. Don't statisticians determine how their data will be interpreted by the nature of the method they select? Doesn't the decision to select one sampling technique or analytic method skew a researcher findings and analysis? Are not researchers impinging their perspective, bias, assumptions onto their study's methodological foundation? Patton appears to portray hermeneutics as more objective, less controversial and more legitimacy-worthy, although he does state the importance of conducting orientational research. He explicitly warns researchers utilizing this frame to be "very clear about the theoretical framework being used and the implication of that perspective" (pg. 87). The methodology or framework that I utilize is often characterized as "identity politics," controversial or illegitimate. I reject this labeling and object to Patton's contention that "orientational" inquiry differs from any other form of inquiry, qualitative or otherwise.

Methodology

The purpose of this dissertation is to understand and interpret the discourse utilized by Mexican American school leadership as they navigate the school finance policy debate in Texas. I specifically focus on determining whether notions of race and racism play a role in their policy and political discourse. The methodology that allows this topic to be investigated is the critical race methodology provided by Solórzano and Yosso (2002). They state,

> For us, methodology is the nexus of theory and method in the way praxis is to theory and practice. In other words, methodology is the place where theory and method meet. Critical race methodology is an approach to research grounded in critical race theory. We approach our work and engage in various techniques of data gathering and analysis guided by critical race theory and Latino critical race (LatCrit) theory. Critical race methodology pushes us to humanize quantitative data and to recognize silenced voices in qualitative data. (pg. 38)

This method is most closely aligned with my epistemological and ontological concerns with "othering," the pervasiveness of a racial hierarchy and a necessity for social justice projects.

A critical race methodology is situated within the Critical Race Theory (CRT) realm of study. Scholars utilize CRT in an effort to "present research grounded in the experiences and knowledge of people of color," (Solórzano & Yosso, 2002, pg. 23). CRT seeks to provide voice to marginalized communities and considers race and racism a "normal" and pervasive aspect of society (Bell, 1992; Crenshaw et al., 1995; Delgado & Stefancic, 2001). It is a "discourse of liberation" that "can be used as a methodological tool as well as a greater ontological and epistemological understanding of how race and racism affect education and lives of the racially disenfranchised," (Parker & Lynn, 2002, pgs. 7-8). The relevance or rationale for utilizing this methodology is further amplified by its potential in achieving an understanding of the intersection of politics, policy and race. Aside for some notable exceptions, this type of scholarship is lacking in education research, the study of the politics of education and educational administration (Haney

López, 1998; Ladsen-Billings, 1998; Ladsen-Billings & Tate, 1997; López, 2003; López & Parker, 2003; Parker, 1998, 2003; Parker & Lynn, 2002; Tate, 1997). As Parker (2003, pg. 154) has noted, "CRT has not crossed over into the field to any significant extent and is virtually absent in the area of educational policy."

Mexican Americans are disadvantaged in many areas of education policy – curriculum and instruction, bilingual education, assessment and accountability systems, and school finance (Valencia, 2002b). A critical race methodology seeks to understand and problematize the majoritarian discourse surrounding education phenomenon. "Standard, majoritarian methodology relies on stock stereotypes that covertly and overtly link people of color, women of color, and poverty with 'bad,' while emphasizing that White, middle- to upper-class people embody all that is 'good'," (Solórzano & Yosso, 2002, pg. 29). This majoritarian methodology is often used by people of color to further entrench a discourse situated in a non-raced and ahistoric context, therefore normalizing racism, inequity and oppression. Investigating whether this phenomenon occurs with this study's cases is central to the purpose.

Design

The purpose of the design for this qualitative study is two-fold – theory development and social justice or liberatory scholarship. The first purpose of this qualitative study is to investigate a "phenomenon in order to get at the nature of reality with regard to that phenomenon," (Patton, 1990, pg. 153). Patton terms this basic research for its ability to provide ontological and theoretical contributions to the literature. In completing this study, the foremost goal is to document the nature of policy and political discourse used by Mexican American school leadership. I attempt to

document how this discourse is (or is not) informed by notions or perceptions of race and racism in educational policy.

The use of a situated theory (CRT) or an ontological interpretation to understand a social problem such as race and racism provides an opportunity to propose "solutions to a problem" or alternatives to addressing social injustice. The purpose of a critical race methodology is designed to further social justice and liberatory efforts. It provides a framework from which to formulate research questions, analyze data, make conclusions and present findings (Bernal, 2002; Parker, 2003; Smith-Maddox & Solórzano, 2002; Solórzano & Delgado Bernal, 2001; Solórzano & Yosso, 2001, 2002). In Patton's (1990, pg. 153) work, he hails this as an applied research design for its ability to "work on human problems" and its aim to provide solutions to social ills. I do not contend that this dissertation represents all the "solutions" to social problems however it works towards understanding the phenomenon of school leadership's discourse of politics and policy.

Methods

Participant and Site Selection

In this study I work with eight Mexican American superintendents and/or leadership (i.e. former superintendents who are active politically through the education service center, in academia or as consultants to school districts) from the Rio Grande Valley of Texas in an effort to better understand the nature of their political and policy discourse surrounding the issue of school finance policy. My rationale for choosing this region of the state is two-fold. First, Mexican Americans make up the majority of the school-age population in this region and school districts are among the poorest in the

nation. Second, a cohesive education organization currently and historically has been politically active in issues such as school finance policy.

School districts from this region have formed a coalition called the South Texas Association of Schools (STAS). Superintendents represent their districts in this organization which lobbies the legislature, formulates policy positions, proposes political strategy and convenes regular organizational meetings. By observing and analyzing their public and private discourse on school finance policy and issues, a better understanding of the discourse surrounding political strategy, policy analysis and race and racism will be achieved.

For this study, I use a purposeful sample of Mexican American school leadership. Patton (1990) defines varied sampling techniques that may be used in selection of cases for study in qualitative research, the goal being an "information-rich" sample. Both extreme and intensity cases have some relevance to this study. Extreme sampling would allow for a detailed examination of school finance policy, the dominant issues pertaining to equity and funding, and practical tax and revenue solutions to the funding problem. However, the purpose of the study is to gain an understanding of the political and policy discourse used by the cases. Conducting an intensity, purposeful sampling technique provided a better sample directly relevant to the purpose of the study. As Patton (1990, pg. 171) describes it, "Using the logic of intensity sampling, one seeks excellent or rich examples of the phenomenon of interest, but not unusual cases" as is done with extreme sampling.

The sample was selected from a group of education leaders using a "snow-balling" technique. It is made up of members of the regional STAS organization and

includes seven current Mexican American superintendents and one recently retired Mexican American superintendent. The all-male sample has varying educational levels (PhD, EdD, Master's), range in age from early 50's to early 70s, were all born and and were all reared and attended public schools in South Texas. They lead districts that are predominantly Mexican American, have student populations that vary in size, academic performance (as measured by the accountability system), and wealth (as measured by the school finance system). Above all, the participants are active, vocal members of the STAS organization.

My personal and professional contacts within the Rio Grande Valley community and throughout district offices in the region allowed me to garner interest from participants and a purposeful sample. I used the executive director of the STAS with whom I have professional relationship as an entry point to the group. I also have professional and personal contacts with former superintendents who are now education consultants. Their assistance allowed me to identity initial cases and begin the "snow-balling" process. The research was conducted in a four month period in the fall of 2003 and winter of 2004 (September-January).

A problematic issue with participant selection was my current employment with the Texas Education Agency. As a state employee in the School Finance Division of the agency, I have developed close personal relationships with many superintendents from around the state, and most significantly with school leadership in the Rio Grande Valley. I strongly conveyed the disconnect between my employment and this study in an effort to build trust and allow for honest and open responses during my data collection phase.

Data Collection

Patton states (1990, pg. 10), "Qualitative methods consist of three kinds of data collection: (1) in-depth, open-ended interviews; (2) direct observation; and (3) written documents." In the broadest sense, this study employed all three data types.

I conducted two interviews with each participant. Each interview lasted between 60 and 90 minutes. The first interview consisted of semi-structured, open-ended questions to collect data on the participants' personal and educational narrative, views on the nature of politics, their outlook for the future of Mexican American school children and their willingness to look at race and racism as an aspect of the school finance problem. This format allowed me to understand the participants' notions of race, racial identity, history and the state of Chicano education. The second interview also consisted of open-ended questions however it was structured less formally than the first. Issues regarding the history of school finance policy, the system's effect on their particular district, their understanding of fairness and equity and what the future of school finance policy should look were addressed. The second interview delved into issues of race, politics and policy that were identified in the first interview. I also sought to highlight key issues from the first interview in order to verify or "member check" their accuracy in the second.

A select legislative committee is currently charged by the Speaker of House of Representatives to investigate the current school finance system. The select committee is divided into sub-committees dealing with facilities, teacher compensation, tax structure, and assessment and accountability issues. Testimony given to the select committee or any sub-committees was collected for further analysis. The participants' testimony was transcribed from the audio recording made public on the internet by the Texas

Legislature. Testimonial evidence was also used in identifying issues to further discuss in individual interviews and the group discussion.

Finally, throughout the study's data collection phase I journaled on my thoughts, perceptions and initial interpretations of the data. My field notes were compiled and incorporated into my journal for use in the data analysis and presentation of the data.

Data Analysis

The critical race methodology calls for "giving voice" to marginalized communities, emphasizes the intersectionality of racism with other forms of oppression, challenges the dominant paradigm, is committed to social justice, and considers the experiences of "others" as vital to the understanding of the phenomenon (Smith-Maddox & Solórzano, 2002; Solórzano & Delgado Bernal, 2001; Solórzano & Yosso, 2001, 2002). Educational critical race methodologists continually ask, "Whose stories are privileged in educational contexts and whose stories are distorted and silenced?," (Solórzano & Yosso, 2002, pg. 36). Parker (2003) proposes that one method for giving voice and providing context and evidence to among others policymakers, is through critical race policy analysis. He describes it as a melding of the critical race theory tenets and educational policy analysis. This study uses Parker's (2003) critical race policy analysis method to situate the discourse surrounding school finance policy in Texas. Brady, Eatman and Parker (2000) have used this method in studying how historically black colleges and universities (HBCUs) have historically been underfund compared to traditionally white institutions (TWIs). They note the funding disparities using quantitative methods and investigative methods which look at the history of the policy, its implementation and its effect. This study utilized similar techniques in analyzing three

sections of the Texas Education Code (TEC) relating to the school finance system and problematized Mexican American school leadership's policy discourse as they analyzed and discussed school finance policy in Texas and its effects on predominantly-Mexican American school districts and school children.

In an effort to move the investigation of the political and policy discourse of Mexican American school leadership towards a discussion of race and racism, narrative inquiry techniques were utilized. Delgado Bernal (2002) states that using the CRT and LatCrit framework, "students of color can be seen as holders and creators of knowledge who have the potential to transform schools into places where experiences of all individuals are acknowledged, taught and cherished," (pg. 121). The same was accomplished with narratives from the study's sample. Utilizing the participants' narratives regarding their personal and educational experiences with school finance policy and race and racism provided another analytic technique from which to draw findings.

Analysis of brief, individual profiles were utilized in the presentation of the data. I used the narrative data to organize profiles of all eight participants and organized the thematic strands that best exemplified the findings on personal background, issues of race and politics and the political and policy discourse revolving around school finance policy. Similar to how the Rio Grande Valley is often characterized as one, continuous borderland, Mexican Americans are often romanticized as one, harmonious, long-suffering group fighting for the same issues under one common goal. Providing a full, rich description of each superintendent provided further points of analysis regarding their leadership, racial identity and political strategies.

Finally, a critical race analys of school finance policy was conducted. Three chapters of the Texas Education Code were evaluated and a general quantitative analysis of school districts, total revenue and demographic statistics was completed. The participants' districts were specifically analyzed and reviewed in an effort to gauge the effect that school finance policy has on their individual districts.

Trustworthiness Issues

Trustworthiness is relevant because the study's legitimacy hinges on whether proper member checking, "voice" and context are provided. Most important is whether this body of work will provide a credible, alternative view of Mexican American superintendents and whether the model may be utilized as a springboard for my future research agenda. Lincoln and Guba (1985) are more to the point when they ask, "How can an inquirer persuade his or her audiences (including self) that the findings of an inquiry are worth paying attention to, worth taking account of?," (pg. 290). They describe the central concepts that can address trustworthiness concerns: credibility, dependability, transferability, and confirmability. The primary concepts that this study will focus on is credibility.

Credibility may be produced through triangulation methods and persistent observation (Lincoln & Guba, 1985). I triangulated my data from the first and second interviews with testimonial evidence and individual observation. Additionally, I used "member checking" techniques and journal entry data to continuously verify findings, impressions and interpretations as accurate. Finally, the data collected from the critical race analysis of school finance policy was compiled and utilized as another point to triangulate data. By analyzing the financial background of the participants' individual

district and conducting the multiple formal and informal interviews, I was able to meet the persistent observations threshold described by Lincoln and Guba (1985). The study's timeline did not allow for meeting prolonged engagement criteria set out by Lincoln and Guba (1985), however, they describe the purpose for persistent observation as the ability to "identify those characteristics and elements in the situation that are most relevant to the problem or issue being pursued and focusing on them in detail. If the prolonged engagement provides scope, persistent observation provides depth," (pg. 304).

In an effort to establish transferability, the narrative and thematic analysis techniques were completed to meet this criteria. A reflexive journal was kept from the onset of the study and was used not only to establish trustworthiness but also during the data analysis phase of the study.

CHAPTER IV: THEMATIC ANALYSIS

Introduction

Since 1969, school finance policy has been a hotly contested political issue in Texas. In that year, a group of parents from a Westside, San Antonio community school district, Edgewood Independent School District, attempted to achieve some measure of equity and fairness by filing a lawsuit in federal court. The Rodriguez v. San Antonio ISD (1971) case made its way to the U.S. Supreme Court before being remanded back to the states, after refusing to rule that access to education is a fundamental right provided by the U.S. constitution. The same group of disaffected parents mounted court challenges in the state court system by filing the first Edgewood v. Kirby (1989) court case in 1984. The last of these four Edgewood court cases, as they came to be known, were finally adjudicated in 1995. The last legislative action responding to court judgment was implemented in 1997 with the institution of a facilities funding program.

Seven years later, the state's Republican political leadership formed the Texas School Finance Project – a joint House and Senate effort to study and propose reforms to the state's funding system. The Mexican American Legislative Caucus has also held hearings all around the state to try and garner support for their position (M. Cruz, personal e-mail communication, October 14, 2003). Texas government concurrently is struggling to meet its financial responsibility not only with Texas schools but also with other governmental agencies – transportation, criminal justice, health and human services. A budget shortfall of $1.8 billion is forecasted for the upcoming legislative session in January 2005 (Strayhorn, 2003), many school districts are being forced to cut programs due to lack of funding (Baird, 2004; Fox, 2004; Richter, 2004) and a new round

of state accountability measures are being forced upon school districts (Acosta, 2004; Wilson, 2004; Zuniga, 2004).

It is within this context that I contacted eight educational leaders from the Rio Grande Valley[17] region of the state. A group named the South Texas Association of Schools (STAS) was formed in the mid 1990s in an effort to better represent the interests of school districts in Region One.[18] After several years, the group admitted districts from Region Two.[19] The goal of the organization is to provide testimony, lobby and advocate for districts on issues concerning state education policy, specifically school finance policy. Superintendents serve as members to the STAS and frequently speak on behalf of the fifty-nine member districts.

In this chapter, I outline the major emergent themes that resulted from the analysis of the two interviews, observations and reflective journal of the eight superintendents from the STAS membership. The first section introduces a common background strand shared by each of the participants in which migrant/immigrant and working-class family values shape their perspective. The second section of the chapter outlines the participants' political acumen, the need for political organization in the Rio Grande Valley and the participants' understanding of macropolitical advocacy. Finally, the third section describes the narrow conception of race and racism held by the participant superintendents.

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[17] The Rio Grande Valley is often called the Valley by Texans. I will use these terms interchangeable throughout the text. The region has a growing population, is among the poorest regions in the state, and has a majority Mexican American population. The area stretches from Laredo, Texas, southeast towards Brownsville, Texas, near the mouth of the Rio Grande River.

[18] Region One includes thirty-seven school districts from the Rio Grande Valley area of Texas. The region is among the poorest of the state and is made up of a predominantly Mexican American populace.

[19] Region Two consists of forty-two school districts, twenty-two of which are members of the STAS. The region is just north of the Rio Grande Valley region, along the Gulf Coast of Texas including Corpus Christi and the surrounding smaller communities.

Migrants, Perseverance, Work Ethic

The first major theme emerging from the findings of this study concerns is the central role that migrant farmworking experiences, immigrant roots and working-class values play in the lives of all eight participants. Four of the eight participants that participated in the study were migrant farmworkers at some point in their childhood. One participant immigrated to South Texas at an early age, and the remaining three came from modest and poor, working-class families. All of the participants of this study professed the importance of education in assisting them to move up the economic ladder, and a significant amount of their conversation centered on the need for a strong work ethic and self-determination, as requisites for ascension to a more prosperous economic class.

The strong work ethic and self determination theme is evidenced in the brief profiles of each of the eight superintendents. The profiles that follow focus on the personal backgrounds that shaped their lives and were compiled from the two interviews with each superintendent and my reflective journal. They are meant to provide a brief glimpse at the commonalities shared by this sample of participants.

José Ybarra

José Ybarra[20] is the superintendent of Nopalito ISD, a 1,500-student school district located in a rural county in the Rio Grande Valley of Texas. The only participant born outside the U.S., his experiences as a child and young adult profoundly influenced his perspective. Mr. Ybarra is proud of his Mexican-immigrant roots, has a clear understanding of effective educational leadership and is secure in his opinions. His thick accent does nothing to dissuade him from exuding confidence, as he speaks freely and

[20] Participant names and district affiliations have been changed to pseudonyms to ensure anonymity.

without hesitation, describing how he worked his way up the educational administration career ladder from district to district in an effort to improve his employment opportunities and the well-being of his family. As with all the participants, Mr. Ybarra's parents, specifically his mother, were key figures in stressing the importance of acquiring an education.

> **Mr. Ybarra:** Well, I was born and raised in Mexico. I had the privilege to come to this country in 1960, when I was thirteen years old, had never spoken English and had never heard it spoken. I was raised in a real remote area, in a *ranchito* [ranch] in Mexico. I was raised by my grandparents and so they were the ones that were responsible to bring me over.
>
> **Interviewer:** You said earlier that your mom really would take no for an answer (in his academic success).
>
> **Mr. Ybarra:** My grandma, that's who I call my mom. She was from Mexico. She had two brothers and one was a lawyer and the other one was in education. And she always, she saw as a young lady, she saw these older brothers going to the city and getting an education and doing well in that and having a different way of living than the *ranchito* [ranch] atmosphere that we had there.
>
> **Interviewer:** They came over to get jobs or was it migratory work?
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> **Mr. Ybarra:** Well, no my parents had already been coming, they were *mojados* [wetbacks] at one time and then later they had their paperwork. Mine (immigration and naturalization experience) is a unique deal. My mom used to clean houses. Well one of those houses she used to clean was for a border patrol (agent). And so it was border patrol that helped her get myself and a sister of mine

to be able to do all the paperwork. He was the one that helped her in getting the paperwork. A super individual, I mean *tenía un corazon* [he had a heart], he wanted to help anyone that he could.

As the conversation turned to a discussion on the types of schooling he received as a child, I attempted to insert a discussion of race, discrimination and prejudice in his early education experience. He did not show a proclivity to discuss the topics and subsequently attempted to deny any serious discussion of it and substitute examples of work ethic and determination. I was intimidated in pursuing this line of questioning in that this man had undergone many hardships, had experienced covert as well as overt forms of racism and discrimination in his youth and had figured a way to "overcome" the obstacles placed in front of him. I decided instead to broach the subjects later in the conversation. I gathered that he was very proud of his background and in fact wore his experiences as a badge of honor.

Interviewer: At the time (that he was in junior high and high school) were the teachers predominantly white or was there a mix of ethnicities?

Mr. Ybarra: I don't remember. With the exception of one which was in vocational arts, I don't remember having a Mexicano as a teacher. A lot of it was Anglo.

Interviewer: And the classes, were they still segregated?

Mr. Ybarra: Well, there were very few Anglos in our classes. But like I said, at the high school there was a Plan III (remedial track). You know, those that were having problems learning either the language or because they had learning problems and maybe some were lazy. You know, who knows.

Mr. Ybarra's attributing some of the student failures to laziness sparked a conversation on his ability to succeed. The work ethic theme as experienced by Mr. Ybarra was evident in the fact that he is a self-described working man. His grandfather made him work as he went to college and his primary jobs early on in his career were in the vocational arts. He clearly believes that working with your hands is essential to developing strong citizens. When asked how he dealt with his late start in education and his English language deficiencies, Mr. Ybarra was rather nonchalant, focusing more on his ability to overcome and do well because of his work ethic. He provided an example of being placed in remedial courses and having to learn to speak the language without much help from the curriculum. Mr. Ybarra recalled being submersed into the regular academic program, never having attended bilingual classrooms. He stated:

> I was fortunate to have teachers, an elementary teacher who really made everything possible to try to help me learn the language. I remember an experience, being disciplined one time because I was speaking Spanish and I didn't know how to speak anything else. *Este* [Ah], then from the sixth grade I went to seventh grade because I was too old to be there. I was then moved to the ninth grade. Actually, in my ninth grade year I think I only got my two electives because the others I was just begging to learn the language. I went to high school in Harlingen and back at that time Harlingen had a Plan I, II, and III. And III was those who are barely getting by, not going to go to the university or anything like that and so I managed to finish this high school in three years. I was able to earn enough credits but all my courses were basic courses.

Mr. Ybarra concludes by highlighting the effort and determination that he put forth in succeeding at the college level. Returning to his example of the varying tracks in the educational system, he stresses how he outperformed some of the students that were in higher tracks than he; once again bringing the work ethic theme to the forefront.

Mr. Ybarra: And it was real interesting that the guys that I was carpooling with, all of them were college prep Plan I's and I was in the Plan III. At the end of the year I was the only one that stayed there because everyone else ended up on academic probation.

Interviewer: Really?

Mr. Ybarra: Yeah (laughter). And I thought well, this is interesting.

Interviewer: Did you have problems when you first started at the university?

Mr. Ybarra: Well yeah. I mean, I was still learning the language. I'm still learning it. And there were certain things that I would ask or say and I would be embarrassed later because I was trying to translate it and sometimes you reverse in the translation. And so, but ah, I had some people in the secondary schools some teachers that really felt that I could learn something and do something with it. Ah, and at one time I guess right at the beginning of my career at the college level was the possibility of looking into teaching because I wanted to help someone else like those people who took the time to try and help me and to try to teach me the language, to try and encourage me to go to school.

Interviewer: And so once you got into Pan Am (Pan American College, now University of Texas – Pan American in Edinburg, Texas) you did two years there?

Mr. Ybarra: No, I stayed there until I finished. I guess it took me about five years until I finished. I would be going, depending on the courses sometimes MWF (Monday, Wednesday, Friday classes), sometimes on TT (Tuesday, Thursday classes). Now, looking back I guess I'm fortunate at the time I didn't think I was fortunate because my dad demanded that I go work with him in construction and so I learned carpenter work. And so, I would work three days a week and go to school three days a week depending on what the schedule looked like. And so, I was able to do that and finally was able to finish that.

Interviewer: You did a Master's there too?

Mr. Ybarra: Yes sir. Once I got my degree, ah, that summer someone from this school district went looking for me because. They didn't go looking for me because I had a degree, but because I was a carpenter. And they wanted to start a program in this district what they call a building trades program and so that's how I got into it really, ah, once I had my degree.

Manuel Lira

Manuel Lira leads Azúcar ISD, a 2,700-student school district that is located five miles north of the U.S.-Mexican border. He attended college in the Valley and began his first job as a high school history and government teacher in a Valley school district. After five-and-a-half years of teaching, he began his six-year tenure as assistant principal at the same high school. Mr. Lira completed his time with that district as the high school's principal for seven years before moving to his current district. He has been the district's superintendent for eleven years and has seen it more than double in size in his time there. His migrant family background and roots in South Texas are strong, having

grown up and graduated from high school from Carrizo Springs, Texas, a town with a population of approximately 5,600, situated about 100 miles south of San Antonio and 80 miles north of Laredo. As he describes it:

> It's basically a rural town. I graduated there and throughout junior high and high school I was a migrant student. So I had to migrate up north during the summers because employment in the little city where I lived, there was no employment and so we had to earn our living. So as a family we migrated up north. I migrated up north; I'm going to say for approximately eight to ten years. We took off in May and we came back in early or late September, depending on whether we completed the work or not. But school had already started and usually we would come in like the second to the last week of September. Usually we missed at least two to four weeks of school. My dad wanted all of us to get an education so that's the most that we would miss.

Mr. Lira describes how his parents wanted more for their children although the only type of work that could sustain the family was migrant farm work. They supported and encouraged him to do well in school, however, Mr. Lira points to vivid memories of this type of work as spurring him to strive for an alternative future career.

> **Mr. Lira:** My dad and my mom wanted all their children to get a good education and they didn't want us to work like they had worked all their lives out in the fields. My father's occupation was basically a carpenter. During the summer carpentry work slowed down and so this (migratory work) was our only means of economic survival.

Interviewer: Is that one of the main reasons you did well in school? I assume you did well during K-12 and were driven to move on to the next level (college)? Your parents were a major influence on that?

Mr. Lira: Yes they were. I didn't want to work as hard as they did. Working out in the fields, long hours, and I'm talking about getting up at four in the morning, being at the worksite by five-thirty and coming home at eight, eight-thirty at night. Because the sun wouldn't go down until about nine-thirty, so we worked the whole time in the field.

Interviewer: What were you guys picking? Pretty much everything?

Mr. Lira: Well, we worked on beets. Hoeing beets and we worked in soy bean fields. We went to pick tomatoes, picked cherries in Wisconsin. It was kind of seasonal thing, from one work site we would go to the next work site, to the next work site, and then back home.

Mr. Lira's hometown of Carrizo Springs is located in a region of Texas known for its political activism in the 1960s and 1970s. He grew up at a time when the Chicano Rights Movement was at its height.[21] A separate, third political party known as La Raza Unida Party was growing in regional and state power; its home base of operation was in Crystal City, just a few miles down the road from Carrizo Springs. The student-led, grass-roots movement which was capturing local political positions in the counties surrounding Crystal City was thought of as militant by many in the established, long-ruling Democratic Party of Texas. People in the Mexican American communities of

[21] See Gutierrez, J.A. (1998) and Acuña, R. (1988) for an excellent description of the Chicano Rights Movement and its history.

South Texas were also suspect of some of the tactics employed by party leaders. At the time Mr. Lira was attending high school, he witnessed the movement first-hand.

> **Mr. Lira:** Well, basically, it was an interesting time in our history that Carrizo Springs was about 50% Anglo and about 50% Hispanic. So there was a lot of turmoil in regards to politics in the city of Carrizo Springs and the city of Crystal City, which is near by. Crystal City influenced Carrizo Springs in regards to politics, in getting more Hispanics involved in the political world and to try to become members of the city commission, mayor of the city. And slowly, more Hispanics became involved in city government. Likewise, school board members, I can remember when I graduated, I don't remember seeing a Hispanic on the school board. About ten years later, we saw many Hispanics on the school board. So it was a time of political turmoil there in Carrizo Springs, in Crystal City and the surrounding area.

As the conversation returned to his educational experiences, he expanded upon his philosophy of education as one that places education as the primary agent for addressing the social ill of poverty. Mr. Lira characterizes his migrant farmworker background and the work ethic that he acquired from it as a positive character trait. He further believes that his desire for self-improvement strongly motivated him to achieve and succeed. Mr. Lira stated:

> It (Education) is the most important factor. Education is the great equalizer. No matter how poor you are, if you continue with your education, graduate from high school, go into college, graduate from college, you are going to be someone in life. And you will be able to get out of poverty. The most important aspects, in

regards to education that I can tell students is that it is the great equalizer. You know, I came from a very poor family. I'm one of many examples that came from very poor families. As a migrant worker, when I was a migrant worker up north, we were discriminated on, but yet, I received my education and I earn a good income. Now, I've gone to trips up north with the interstate-migrant program and I go and talk to students about how it helped me and how being a migrant student influenced me about the importance of education. My parents pushing me to get an education, it has paid off, and they can do the same, that I was just like them at one time.

An example of some of the intimidation and discriminatory practices used by administrators in his schooling experience was shared by Mr. Lira. He returned to describing the political turmoil that was affecting white and brown communities in his hometown and stated that "politically it was an eye opener for me" as he witnessed activism and defiance being practiced by "sixteen, seventeen, eighteen year olds, a lot of changes going on." His school was a "very conservative school" and the white principal was, as he described, a "marine sergeant." Mr. Lira recounts one incident in which his mother's strong belief in education put him in conflict with the orders of the administrator.

Mr. Lira: I remember one specific incident in which my hair touched my ear and he sent me home. He sent me home and told me that I needed a haircut and not to come back until the following day. I went home. I explained the problem to my mom. My mom gave me a dollar to go get a haircut. I went to go get a haircut and got back home. My mother sent me back to school. And I said, "Mom, I can't go

back to school until tomorrow." She says, "I want you to go back to school. I don't want you to lose any school. That is not a good reason to miss any school. If you needed a haircut, okay. I got you the haircut, go back to school." Well, the principal had sent me home in the morning and I went back to school right before lunch. Right after the lunch, the principal saw me inside a classroom. So he called me out, took me to the office and he got his big paddle out. And he said, "Didn't I tell you to go home?" "Yes, sir." "Then why are you here?" "Sir, I went home. My mom asked me why I was home. I told her that you had sent me home. I told her the reason. She gave me some money. I went to go get a haircut, sir, and she told me to come back. I told my mom that you had told me that I couldn't come back to school. My mom insisted and ordered me to come to school. Sir, I'm just following orders." And he said, "Well for following orders I'm going to give you three licks." And I said, "I'm sorry sir. I think you need to go visit my mom. You need to explain that to my mom and if my mom says yes, then you give me my licks." In other words, you're not going to touch me. And, the principal was impressed that I stood up to him. Usually the students would just take the three licks and go back to class. And I said, if I deserve the three licks then I'll take it but at this particular point the reason he sent me home was for a haircut and I got a haircut. My mom told me that I should not leave school, that that was not a good reason to leave school. He didn't give me the three licks and he kept me in the office for the rest of the day.

Interviewer: He never talked to your mom?

Mr. Lira: Never called my mom, never went to visit my mom.

Henry Tamez

Mr. Tamez is a man of medium stature, in his mid-sixties, full of energy. His personable and charismatic demeanor serves him well. It is no surprise that he has been successful in maintaining a high pressure and politically volatile position in educational administration for over thirty years. He engages me instantly, allows me to explain the purposes of my study and asks me where I am from. This allows me to disclose that my family is from South Texas, mentioning that my father grew in La Villa, Texas, a small town thirty minutes from his school district. Mr. Tamez reveals that he also is from this area of the Rio Grande Valley known as the Delta Area. He attended and graduated from the same high school with some of my uncles. This introduction assists me in building trust as I begin the interview.

The district that Mr. Tamez leads, Algodón ISD, has 2,100 students, is located on the east end of the Rio Grande Valley, ten miles from the city of Harlingen. It's a district that he has lead for ten years after having served as an assistant superintendent in one of the poorest school districts in the Valley for eighteen years. From the onset of our conversation, Mr. Tamez is direct and expresses how vital his parents' support and the work ethic they instilled in him and his siblings were to their educational success. He begins the interview by stating, "I'm from the Edcouch-Elsa area. I was born in Elsa. Migrant family. Folks were from Mexico. Not a day of education, *pero lo que nos dieron* [but what they gave us] it was attitude about education."

The Delta Area of the Rio Grande Valley, an area that encompasses the small towns of La Villa, Monte Alto, Edcouch and Elsa is known for its vast and nutrient-rich farmland. The area's long history of political and social inequity is closely tied to the

racial hierarchy that aided the dominant, white farmers who thrived as a result of the surplus Mexican and Mexican American labor force. Mr. Tamez, more than any other participant, exhibited the interwoven complexities of being raised in an overtly racist and economically depressed community by parents who believed in education as the only path to economic improvement. He struggles to reconcile his ability to succeed in the face of such discrimination and prejudice, while questioning the inability of others in the Mexican American community to overcome similar circumstances.

> **Interviewer:** Where did you guys migrate? Did your family migrate up north, out of state?
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> **Mr. Tamez:** Ah, no, we would go up just south of Plainview, ah, what's this little town just south of Houston? Ah, no we never migrated up to the Midwest. It was all Lubbock, the panhandle area, the cotton belt. *Desde chiquitos* [From the time we were little kids], we'd come in October.
>
> **Interviewer:** So you'd come in late (to start school)? You'd work until October?
>
> **Mr. Tamez:** And yet, in spite of all that, *nos educaron* [they educated us].
>
> **Interviewer:** And you learned that (the importance of education) growing up? Your parents you said emphasized education?
>
> **Mr. Tamez:** They did. *Mira* [Look], both my parents, I can say this with some honor *de que* [that] they were both wetbacks. They were going back and forth to Hebron (Hebbronville, Texas) and Edinburg *y eran* [and they were], we lived in a labor camp, Engleman and Garden, I don't know if you know where Engleman and Garden is, just north of Elsa, in a labor camp. Yet, I've got an older brother who's an attorney; both my twin brother and I are both superintendents. My other

brother was an administrator for another district in the Valley. So, *estos pobres padres nos educaron a todos* [these poor parents educated all of us]. But, it was the, it was the basis at home *de que* [that], "Hey, there is no choice. You're going to school. You're going to college. There is no choice." *Y lo bonito es de que nos trabajaban todos los dias en la algodon, el vetable, la zanahoria, la sandia, la algodon*. [The beautiful thing is that they worked us every day in the cotton, vegetable, carrot, watermelon, cotton.] So there was a, there was at least an idea *de que* [that] if you wanted to break this little cycle, "*Te tienes que salir*. [You have to get out.] You have to go to school." I don't see that in kids anymore. I don't see that work ethic. I don't see that reason for getting out. *Ya todo ta muy, la papa ta allí, ya me lo tan dando.* [Now everything is very, I've got what I need, now they're giving me everything.] *Me intiendes?* [Do you understand me?] I think the idea is at home and the key people are parents. *Este, no pero gracias a dios que* [Ah, no but thanks to God that] living in the Delta area, *que nos dieron* [that they gave us] that mind set that you've got to get an education.

Mr. Tamez expressed no outright, ill feelings toward his parents, the community, or the ruling-white majority for the conditions in which he had to endure during his schooling experience. He understands the adverse and deplorable conditions in which he lived to be a given state of reality, and as such, his task was to learn to deal with and overcome them. Mr. Tamez viewed his family's poverty as something that he could overcome and education was the way out. He continued to return to the notion that the work ethic he learned and the desire to not be relegated to such a way of life assisted him succeeding in the education setting.

Interviewer: So when you went to school was there still a lot of segregation or was the student population still majority Mexicano?

Mr. Tamez: Oh yeah. When I went to high school there was a 75% Anglo, 25% Hispanic. No, you don't remember the Delta area, it was, all the farmers were white. Lot of guys, lot of kids that graduated in 64 were white. *Este* [Ah], yeah, I went to the, the only Hispanic school was Elsa, the Kennedy Elementary. I don't know because we were from Elsa but I know the Edcouch campus was the migrant campus. I don't know if you know any of that. The central campus was for the Anglo, the affluent Hispanic. The Edcouch campus was all the migrant Hispanic. The Elsa campus was for the all-Hispanic.

Interviewer: And that's where you went?

Mr. Tamez: That's where I went, to the Elsa campus, the all-Hispanic. Of course, at the junior high that's where they mixed. I remember, Enrique, that I was in the third grade, I still didn't know a word of English. The first word I learned in English was stalk, stalk. And it was, I remember, I caught onto that word because it was Halloween and it was the fall season. Stalk, of all things, of all words, that was really the first word I learned as far as English. Third grade, I remember I was sitting in a classroom, not understanding a thing. *Me bañaron, a mi y el cuate mío* [They bathed me, they bathed me and my twin] in the janitor's sink in the third grade. *Nos encueró la enferma y nos bañaron* [The nurse stripped us and took us a bath], that's how bad we smelled. But I became the principal for that campus, ten or twelve years later.

Mr. Tamez equates his success with his migrant background and attempts to understand how others remain in poverty by using work ethic as the explanatory variable. It was a difficult life he had as a child but he relished the experience. He felt that it made him a better person as an adult. A vivid explanation of the day he first "realized" that he didn't want to do migrant work the rest of his life is striking. He asserts that children who've never experienced such work do not know and can not ever understand his sense of motivation.

> **Interviewer:** All the superintendents that I've talked to so far were migrants.
>
> **Mr. Tamez:** Miguel De Los Santos, Homero Diaz (two retired, long-time superintendents from the Valley), and you know, *yo me acuerdo* [I remember], it was an August day, 2 p.m. in the afternoon, *taba* [I was] just north of Monte Alto *en un* [in a] field. *Taba el algodon, chingao* [The cotton was, shit], high, *y* [and] we were kids, we were twelve, thirteen years old. *Me levanté llorado*. [I woke up crying.] *Un calor de la chingada, fuerte*. [A tremendously strong heat.] *Dije no, pero chingao*. [I said no, but shit.] This ain't gonna go on like this. *No, yo me voy educar*. [No, I'm going to get educated.] And a lot of it, that's what, you're not going to make that decision watching Oprah, 2 p.m. on a Monday afternoon, are you? No. And I think child labor laws *y todo esto, ya cambiaron* [and all this, they've changed] to what, *ya* [now] you don't have that inertia anymore.
>
> **Interviewer:** You remember the heat the most?
>
> **Mr. Tamez:** The heat. Yeah, it was 2 p.m. *Me levanté*. [*I got up.*] I must have been twelve, fourteen years old. I was in junior high. *Era un sabado y me acuerdo, hijuale chingada!* [It was a Saturday and I remember, son of a bitch!]

You couldn't breathe, *taba el peste del algodon y todo el borlote*. [There was the stench of the cotton and all that stuff.]You know, *ya blanco del sudor*. [I was already white from the sweat.] No, man.

Interviewer: And at that point?

Mr. Tamez: At that point *dije* [I said], "No, no. This ain't gonna go on." *Y fijate, mis hermanos* [And look, my brothers], we were still, *mi hermano* [my brother] who is an attorney was probably already in UT (University of Texas at Austin), but yet *la familia, apa y ama todavia, "Tu hermano ya se fue pa Austin pero ustedes todavia en la pisca"* [the family, father and mother still, "Your brother already went to Austin but you all still have to go to work in the field picking"]. It wasn't that my brother already went to the university, no, that cycle didn't break there. *Este, ya* [Ah, now] society today doesn't have that. You know now with these child labor laws I can't employ kids in the summer and give them a shovel. They won't let me. So they stay home, watch TV all day and get obese. Well, *pero el Mexicano, chinga* [but the Mexican, shit], there's got to be some new energy, we've got to think of something.

Wanting to build additional legitimacy and trust with the participant I shared a story from my childhood in which I explained my inexperience with migrant work. My parents were both migrants but that is something that I never had to experience. I asked him if younger generations would ever be able to understand that perspective and whether an understanding of it would benefit today's youth. Mr. Tamez' point is brought to the surface when he shares a personal example of how he becomes frustrated with his own son and his reluctance to cut the lawn in the hot Texas sun. He describes his inability to

get past his frustration by stating that his understanding of work ethic is "embedded in me." This entrenched sense of work, discipline and desire to achieve lies at the center of Mr. Tamez, as well as the other participants', being.

> **Interviewer:** Many in my generation didn't grow up picking cotton. And so, what is our understanding of the situation going to be because you have that perspective that I will never have?
>
> **Mr. Tamez:** You would never get it. You would ***never*** (emphasis) get it. *Cuando vas* [When you go], when you're six years old, *íbas hacer montoncitos* [you would go make little piles] of cotton for your parents, and all through high school I didn't play football. I didn't ever see a pep rally. I didn't do anything after school because *taba jalado* [I was working]. When you get that, you don't become bitter towards your parents, you know. I'm not bitter to my parents for having done that. I think, if it wasn't for that I wouldn't be here. It made me who I am. Honestly, I truly believe that. *El chamaco mío* [My son], my eighteen-year-old, *que le digo yo* [when I tell him], and it just irks me, *le digo* [I tell him], "*Mira* [Look], go cut the yard." *Que me diga* [That he tells me], "It's too hot." *Hijuale chingada* [Son of a bitch]! It just blows my top. My wife can't understand. *Le digo* [I tell her], "Well, you don't have the backbone *que tengo yo* [that I have]. *No intiendes*. [You don't understand.]" "It's hot, its…" I don't care of it's hot. *Hijo* [Man], man, it just, and I try to reason with myself. *Me digo* [I tell myself], "*Chinga, ya* [Shit, that's enough], get off that shit." But I can't, it's already embedded in me.

Jesus "Chuy" Gutierrez

Chuy Gutierrez' office is filled with countless political artifacts from his "twenty-one years as an elected official, mostly as mayor." A political background that he characterizes as, "all that time I was changing stuff for the Mexicanos," Mr. Gutierrez' prominently displays an autographed photograph of U.S. Senator Edward Kennedy of Massachusetts on the wall next to his desk. Born and raised in the Valley, Mr. Gutierrez attended Pan American College, became a teacher and coach and after becoming involved with the Mexican American Youth Organization (MAYO) in college, decided to move to Crystal City to work with La Raza Unida Party. Mr. Gutierrez joined the Party's teacher core program, moved back to the Valley after having received a Master's in Bilingual Education and threw himself into the local political scene, first as a city councilman then as mayor for fifteen years. I ask Mr. Gutierrez how he responds to those who feel that politics is a dirty game and has no place in education. He explains, "I don't (think of it that way). *Cuando a mi me dicen, 'Él es politico,'* [*W*hen they tell me, "He is a politician,"] to me that's a compliment. A lot of people think, '*Es politico* [he's political],' like that's a bad dude."

Mr. Gutierrez leads Oso ISD, a district with approximately 25,000 students, and notes that he is the first "local boy" to have been hired as superintendent. His family migrated to the panhandle of Texas, known as the cotton belt, to sustain his family by working the fields. Mr. Gutierrez mentions, "any type of harvesting you can mention I've done it." Although he clearly is extremely bright as evidenced by having graduated from high school two years early, he places his academic success squarely on the support and preparation he received from his parents. He mentions his mother as the driving force in his early academic success.

Interviewer: When you were in the public school system, why did you do well? Did your parents push you to do well in education? Or were you naturally a good student?

Mr. Gutierrez: We were migrants and I'm indebted to my mom who passed away at a very early age. I was seventeen when my mom passed away. I knew how to read and write both in English and Spanish before I went to school. My mom went only through the third grade but I knew all my colors and I knew the alphabet and I knew how to read and write in short sentences before I even went to kindergarten.

Interviewer: She believed that?

Mr. Gutierrez: That education was, oh yeah, a strong believer of education. I never missed a day of school. Even though I was a migrant they would bring me back, my brother and I, they would bring us back before school started and we did not leave to migrate again until the last day of school.

Mr. Gutierrez differed from the majority of the other participants in that he was explicit about the unfairness and discriminatory practices employed by administrators and teachers in his schooling experience. He was active in politics at the high school level and even participated in school walk-outs when demands of students were not being met.

Interviewer: So when you went through school, all administrators and teachers were Anglos?

Mr. Gutierrez: Every single one of them.

Interviewer: Because the (student) walkout, was the walkout based on what was going in the schools?

Mr. Gutierrez: Right. The walkout basically had several demands. I can remember some of them. Some of the demands were, you know, we were not participants in athletics especially for the migrants. You come late, you're not part of the program. We had a different route. They would put all the Mexicanos in what we call back then Practical English. They sent you to a course that was not a college preparatory route. And they sent a few of us, a few of us with all the Anglos in route one, as they used to call it. It was the college prep. I was in that route. My brother was in the Practical English. My brother is a year older than I am and we graduated together. They skipped me a couple of years. I graduated when I was sixteen. So I went through school rather quickly and I experienced several things in high school.

His use of two more examples of unfairness and racism further demonstrates a broader critique of the context and conditions endured by Mexican Americans in the Rio Grande Valley during the 1960s and 1970s. His reaction to his English teacher exemplifies his unwillingness to be held down by the racial hierarchy.

Mr. Gutierrez: I remember Mrs. Brooks was my English IV teacher. I refused to give a report. I remember the book, *A Tale of Two Cities*. I refused to give a report in front of her class and she gave me the first C ever in my life. I had never gotten a C – A's and B's all the way through my senior year. I remember her pulling me to the side and she tells me, "You are not college material." She told me that! I rushed to my counselor and I tried to complain. We had a counselor there by the name of, *la unica Mexicana* [the only Mexican lady] in the whole administration, Ms. Rodriguez. And I told her, "Do you know what my English teacher told me?

She said that I wasn't college material. Look at my grades? I'm a Boy's State candidate. I'm this and I'm that. I make really good grades. Why would she say that?" And she said, "What did you tell her?" I said, "I just looked at her and I walked away. I didn't tell her anything." She asked, "Well, what are you going to do?" I said, "I'm going to prove her wrong. I'm going to prove her wrong and I am going to go to college." And that's when my mom had just passed away. And I did go to college on my own.

Interviewer: What was your reason for not doing the report?

Mr. Gutierrez: The reason that I, I didn't want to stand in front of the class, in front of all the Anglos. You know, I was timid. I was not a public speaker. And I told her, "I"ll do anything that you want in writing." And she gave me a C, but what really hurt was when she told me that. You know and I had just gone through some experiences in my junior year. I had an uncle who just passed away by the way, passed away a few months ago, *mi tío* [my uncle] Locho, who was the youngest in our family, my father's brother. We had an experience with him when I was like maybe twelve. He must have been in his twenties, maybe thirty. One of these times when we went up north, in Marcum, Texas, he went into this beer joint. He liked to drink like a lot of our Mexicanos. He had a few beers and he went into this beer joint where it had a sign, "No Mexicans Allowed" and he demanded to be served. He went up to the bar and asked for a beer. The bartender shot him right here (pointing to his throat). All his life after that, you know he died a few months ago and he must have been almost 80, probably 78 or so. So from the age of twenty some odd or thirty-years-old, he didn't speak – for the rest

of his life. That's for forty or fifty years. He did not speak because an Anglo shot him. And you know what? Nothing was ever done to that guy that shot him. So those are things that I kind of remember and Mrs. Brooks telling me that. I experienced some discrimination.

Richard Muñoz

Richard Muñoz is a recently retired superintendent of over thirty years, now active in the STAS leadership. In his late-sixties, he grew up in South Texas and spent the large majority of his adult career as a school administrator in the Rio Grande Valley. His only experience outside of the Valley was as a director of federal programs for a job training center in Central Texas. I met with Mr. Muñoz in his office of the Region One Education Service Center where he now does consulting and training work for new superintendents in the region.

As with all the other participants we began with a discussion of his early childhood and the experiences he had attending school. His first example or memory he chose to share was of the inequity he saw and the segregation he experienced as a young child attending elementary school.

Interviewer: What was your experience in the education growing up? Can you talk a little bit about where you're from, I don't know if you're from the Valley, if you grew up here or moved here?

Mr. Muñoz: I was born, ah, I was from an area, I went to public schools in an area back in the 50s, in fact, I graduated from high school in 1956 northeast of Corpus called Rockport. Very, very segregated, in fact my first four years of school I went to a wooden school house and right across the road, literally right

> across the road, maybe 100 yards away there was this real, beautiful, brick building where the Anglos went. This was back in the 50s, well, in this case it would have been in the 40s, late 40s. And so, that's where I came from, very segregated, but in the fourth grade they took four of the top Hispanic students and moved them across the street. So, I moved across the street in the middle of my fourth grade year. Ah, and started to go to school with the Anglos at that time. But that's the kind of situation I grew up in, very poor and ah, and in a segregated type of society.

In his description of the racism, discrimination and segregation he experienced, Mr. Muñoz attempted to "remind" me of my inexperience by remarking that I may have "read about it." However, it was curious that he failed to follow-up on the fact that he was only one of four Mexican American students to be transferred to the white school. He did mention that his grades were good and that he worked hard to accomplish his goals but never explicitly mention the systematic exclusion of most Mexican Americans from equal opportunities in education, as well as other sectors of society. He uses repetition to emphasize how little knowledge he had when starting the process of acquiring his college education and despite his success his inability to get a job in his hometown.

> **Mr. Muñoz:** Hispanics weren't supposed to go on to school in those days. You're too young to remember any of that but you've read all about it. And, ah, by accident I decided to go to Del Mar Junior College in Corpus. I showed up just saying I wanted to go to school on the day that. I had nothing. I didn't even know what catalogues were. I didn't even know nothing. My counselor at the school hadn't told me anything. It took me two days to register because I knew nothing.

And, I stayed at Del Mar for two years in Corpus. I drove back and forth everyday. It was a 35 mile drive. And then, I finished there with honors and then I went to Texas A & I in Kingsville and I graduated from Texas A & I in Kingsville in May of 1960 with a degree in secondary education, history and government. I applied back in my hometown, forget it, they wouldn't even interview me. I had made real good grades. I had made, the smaller schools have an honor society, academic, called Alpha Chi. I was part of that, everything, historical honor society. They wouldn't even talk to me, so I applied down here in the Valley. Never had been to the Valley, believe or not. I wound up in Edcouch-Elsa, had never been to Edcouch-Elsa before in my life. And, ah, I started teaching there in 1960.

Mr. Muñoz detailed his first job experience and equated it to his educational experience, noting how the practice of segregating Mexican American migrant and poor school children from more affluent Mexican American school children and white school children was similar to what was common in the mid- to late-1940s. He also explains his hiring as an administrator at a very early age as "lucky," the result of an Anglo administrator's desire to bring him along with his staff.

Mr. Muñoz: I taught fourth grade, forty kids in the room, in a segregated campus. It was a segregated campus, the Anglos went to another school. But I taught in a 100% segregated, and the lower, because if you were a Hispanic, just like in Rockport when I went to school, if you were a Hispanic that was not of means but of middle-class, you could make noise and they would accept you with the Anglos. That was the case when I went to school in Rockport. I know my cousins

went with the Anglos while I went to the Hispanic school. And then, when I taught it was the same way, there was a lot of Hispanics with the Anglos, but those were the middle class. So, I taught in a segregated school my first year. I taught there just one year. Then I moved to the junior high, taught there two years, then I moved to the high school, taught one year. So in four years I had taught elementary, junior year and high school. Then I got lucky and I got named as an assistant principal, part-time, so I taught and was a part-time assistant principal, for a couple of years there in Edcouch-Elsa. Then, I got lucky again, the principal who was an Anglo became the superintendent and he took me with him. And so, I didn't become a principal, I went with him and became, eventually, director of federal programs.

Interviewer: And at that time, the central administration part of it was all Anglo?

Mr. Muñoz: Oh yeah, all Anglo, even the principals, the counselor, all Anglo, teachers, mostly all, you know, it was predominantly. The top was definitely 100% and the teachers were probably, the majority, the large majority were all white.

Interviewer: So that was for the majority of the 60s then?

Mr. Muñoz: Oh yeah, oh yeah. And it wasn't until the late, from the middle 60s on that Hispanics started to run for school boards and get elected for school boards and that led to hiring teachers and eventually, led to assistant principals and principals and superintendents and all of that. All that movement, for most part, didn't start until about the mid-60s.

Joe Treviño is widely regarded as a rising star in Texas' educational administration establishment. He is the only study participant to have completed a doctoral program. Dr. Treviño is in his second superintendent position in Karankawa ISD, a district of approximately 40,000 students located on the Gulf Coast of Texas. The district is not considered to be in the Rio Grande Valley however it is a member of the South Texas Association of Schools as a Region Two district. Dr. Treviño spent his first superintendency at a large school district in the Valley before taking the higher profile position in his current school district.

The conversations with Dr. Treviño were held in his downtown office close to the Texas shore. A conservatively dressed gentleman in his early-40s, Dr. Treviño was guarded and deliberate in his responses. Unlike six of the other participants, he has substantial administrative experience outside of the Rio Grande Valley and South Texas. He worked as an assistant superintendent in a rapid-growth, suburban school district in Central Texas. Additionally, he is one of three study participants to have no childhood migrant farmworking experiences. However, his perspective is shaped by parents who were working-class immigrants. Dr. Treviño was an all-state cross-country runner in high school, a fact I learned from one of the other participants. When asked about the influence his parents played in his educational success, he states:

> I think they were supportive and I say supportive, my mother only went through sixth grade in Mexico, as far as education. My dad only went through third grade. So they didn't have a, what one would call a formal education. And so yes, they were real supportive and let me go through school, being supportive in my attending college. I was the first one from the family to go to college. And so

yeah, they've been supportive all along. They were very supportive in my involvement in school. I was also very involved with the Boy Scouts and I know they were very active and involved with me in that. So they've been really supportive.

I asked Dr. Treviño about his decision to choose education as a career. Most of the other participants had answered that their primary reason for entering the education field was out of necessity, job-related or because of family reasons. Two wanted to be lawyers, one a diplomat, one a dentist and another a physical therapist, but Dr. Treviño was resolute in his desire to enter the education field and become an educational leader.

Interviewer: So why did you go into education? Was that always your goal?

Dr. Treviño: Pretty much. I mean I thought about some other careers but I always focused on education because of the difference that teachers and principals, assistant principals had made in my life. And so I wanted to in a position to influence a large number of students and I saw that the way to do that was through the superintendency. And not only through the superintendency, but through the superintendency of large school districts. And so I've always wanted to be in a school district like this, a large school district. So that whatever work we do has an impact on students and their opportunities to get a good education, be successful and go on to college.

Dr. Treviño's work ethic is evident in the manner that he approached his early career. He worked his way through college and immediately began his master's and doctoral programs. He believes that relocating to other parts of Texas is necessary if one is to achieve their goals and even cited the unwillingness of some Mexican American

leaders to relocate as a barrier to the further advancement for qualified school leaders. He described his advancement in the following way:

> I immediately enrolled at Texas Southmost College (a junior college in Brownsville, now University of Texas at Brownsville), was there a summer, all spring, summer, then transferred to the University of Texas, graduated in December of 78 at midterm, from UT Austin. I went back to Brownsville to work, immediately enrolled in a master's degree program at what then was Pan American University at Brownsville. I got my master's about two and half years later, continued to stay in Brownsville through 1983. At that point we moved to, I was married at that point, moved to Austin to work on my doctorate degree, went to school for about a year and a half straight through and I started working at a Central Texas district. Finished my doctorate degree in 1989 and we stayed at that school district I guess through 1995.

Hector Sobrevilla

Hector Sobrevilla is a very talkative, often rambling, superintendent who leads Snowbird ISD, a district of almost 11,000 students. The district is in the heart of the Rio Grande Valley and is described as a bedroom community with little or no industrial or corporate jobs and is known as destination for many "Winter Texans," affluent, mostly-white retirees who migrate south from the Midwest U.S. during the winter months. An amiable individual, he moved from topic to topic with little prodding. Perhaps the most down-to-earth, community-oriented school leader that I interviewed, Mr. Sobrevilla volunteers with his church and is involved with the Boy's and Girl's Club in his town. He is the first native-born resident and first Mexican American to be named

superintendent of his district. At the conclusion of our first meeting, Mr. Sobrevilla wanted to interject the philosophy by which he lives and leads his school district. He states:

> I'm in a particular situation, because I was born and raised here. I have a stake in all of this. The other thing is this, out of all the people that went to school here I'm probably one of the few that are educated, that have a higher level of education. Consequently, I'm also a leader and not in just a sense of politics but also spiritually, emotionally. I've been involved with Lion's Club, Boy's Club with the church and all that. But I think that it's important as a community person not just to take but to give. And I think in the end you don't do it (lead) because you want for yourself. I think, I do it because I think its part of my responsibility to the community. So that makes me a little different than other superintendents who are not from the community that have other points of view.

Mr. Sobrevilla was raised in a migrant farmworking family that survived year to year by migrating north to work in the fields. He credits his parents for instilling in him the desire to do well in education. Like other participants, he provides examples of what motivated him to get educated in order to advance from the type of work he grew up doing.

> **Interviewer:** Why do you think you were able to do well in school? Were your parents always pushing you?
>
> **Mr. Sobrevilla:** Ah, they were really supportive, especially my mom. My mom had maybe a first grade education, but she was very supportive. She was always there. And that's what I tell parents. You know it doesn't matter whether your

kid's an outstanding kid or not. What matters is that, and of course back then the mother didn't work.

Interviewer: Outside the home?

Mr. Sobrevilla: Outside the house, now they do so it's kind of hard. But still the support has to be there. If you are supportive, if you give that support to the kids, not just in elementary but throughout high school, then you're going to be successful. And to me that's why I was successful. And I know my dad sometimes would want me to stay and work (up north in the fields) but then he gave me the choice. He didn't go to school. But he was smart, he would say, I was picking cotton *allá* [over] in Kitty Quay, in West Texas, in the hot summer and then stayed until November. When I was about thirteen-years-old, he would tell me, "What do you want to do, do you want to pick cotton the rest of your life or do you want to be in an office?" Hell, I didn't have a lot to choose from right, so I said I want to be in an office. That made sense to me. So he ingrained that in me since I was a small kid.

Mr. Sobrevilla was raised on the eastside of his town. As he described it, all the schools were segregated with the eastside schools educating the Mexican American kids and the other schools educating all the white students and some of the higher achieving Mexican American students. He shares a personal story of his family's hardship working in the fields and explains how common educational practices punished him for returning to school late after working in the North.

Mr. Sobrevilla: I think they had all the Anglos over here, on the north side of the (train) track. So I remember when, to do segregation my assumption is this, I

scored real high on the CAT, California Achievement Test, so when I went to second grade, I still remember like it was yesterday, the principal talking to me, he name was Vick Macorato, he said, "You know Hector, I wish I could keep you here as a second grader but because of your test scores and all that you're going to Central Elementary." So, they transferred me over. I'm assuming they transferred the students that were higher achievers over here. *Pos* [Well], I didn't know any better I mean I was a second grader. So, I never went to the Eastside Elementary.

Interviewer: And Central was the white school, the Anglo school?

Mr. Sobrevilla: Yeah, because I mean, half of the kids were white. *Este* [Ah], I didn't pay a lot of attention to it, I guess, because I was a kid but I went to elementary here when I was in second through fifth grade. And I remember I started sixth grade with a teacher, Mr. Allen, and I was there about two or three weeks and then we had to go pick cotton in Port Lavaca (Texas town on the Gulf Coast). It was a real bad year. I think it was like in 1962. There had been a drought and we had gone through a lot hardships that summer, I remember. It didn't work out, *este* [uh], so we went to Port Lavaca. My parents would pick cotton. I don't remember going to school there. I usually went when I had a chance but because we had started (late) I don't think we went (to school). And I think that's when the hurricane hit. I forgot if it was Alice or some hurricane hit around that time back in 62.

Interviewer: You just remember that it was a big hurricane?

Mr. Sobrevilla: Well, I don't even remember it was a hurricane. All I remember is that it rained like, like it's raining now in Cameron County, you know. I

remember that we lived out about half a mile from the road. It was an old, old farm house and I remember it had been raining, and raining and I got so sick because of the mosquito bites. I had to be taken to the doctor, I remember I had chills and stuff. Anyway, it kept raining and raining then the next thing I remember was that we were walking out with our luggage on our backs and the water was real high. And I remember a man, he was an older man, but a real strong guy, he carried a big suitcase, a big one, on his back. And I remember he was in front of me and I remember I could see all the water splashing. We put it in the truck so we came back. Well, to make a long story short, I came back, let's say, like maybe towards the end of the six weeks, well they didn't have any room for me all of a sudden. So I got sent to all-Mexican school. It used to be called *la escuela de los burros* [the school of jackasses] because all of the older students, all the rejects were being sent over there. I mean, I don't remember Anglos being there. I can't recall. But I knew that they were sending me over there. And I remember that there was a guy who was about three or four years older than I was, he was probably like fifteen and in sixth grade. They used to call him Lupón, that's why I remember, because he was from the barrio (that I came from).

I asked Mr. Sobrevilla if he believed that education was a way to alleviate poverty and provide opportunities for all children. He provided some personal examples of his childhood experiences and reiterated that a strong work ethic is necessary for academic success. He recounted:

You know, Enrique, I'm a prime example of it. My dad eventually became a custodian and my mom, I used to help my dad when I was in the seventh grade

but to me that was part of working. He used to clean the gym when they played basketball and I used to help him clean during the half-time. But that was part of my work ethic that I was brought up with. I couldn't participate in athletics. I wanted to and I was big for athletics but because I had to work, I couldn't do it. I think that was part of the work ethic to be able to do those things and to be proud of doing it. So I understand. You know, theoretically, I've been a custodian. I've been a bus driver. When I was in Weslaco (a Valley school district), I drove a bus to make ends meet. I had just gotten married. Drove a bus, went to college, the whole works and so I've never lacked. I guess because of the work ethic, I never lacked for a job. I mean there are jobs if you want it. But I know what it is to be a custodian, what it is to be a bus driver, you know, what it is to be a teacher.

He further stressed the need for determination and "heart" as part of someone's work ethic. Mr. Sobrevilla said this attribute was lacking from those not able to achieve. I asked if he thought the educational system was fair and that a large portion of the Mexican American community not doing well was a result of being disadvantaged by the "system" rather than laziness or lack of determination or intelligence.

Mr. Sobrevilla: The system is set up. The system is already set up. I as a parent, I as an educator have to make sure that everybody is aware of it. They have to know, basically what the system is. You get an education, you are going to be successful. And the more education you have, the more successful you are going to be. And it doesn't just mean money, it means freedom, it means a lot of things. But you've got to pay a price. It's about dreaming but like (former President Lyndon B.) Johnson said, make those dreams come true. Yeah it's okay to dream,

like I used to tell the kids when I was principal at, but to do that you have to be willing to work, you got to be determined and it comes from here (pointing to heart). I can't, I can't make you pass a TAAS (Texas Assessment of Academic Skills, Texas' standardized test in the 1990s). I can help you. I'm there. I support you. I'll provide you with supplies and good teachers. I can't make you pass. It has to come from you. The ambition has to be there. *Mira* [Look], I had a brother and sister, same dad and mom. My brother, seventh grade, rebel to no end. My sister, eighth grade dropped out. She'd rather work. It's the ambition that you have. I mean, I have a nephew and a niece. They were brought up with my mom. My mom inspired me and she inspired them but they also chose to do what they wanted to do. And I would counsel, I was counselor then, I used to counsel them. But they had to make choices.

Interviewer: They saw you and what you did to? You were an example?

Mr. Sobrevilla: But still, even with that Enrique, even with that, they made bad choices. Where now in their mid-30s and 40s they could be more successful and they are, but they had to make that choice. My nephew would lie to me and say, "I'm going to school." I knew he wasn't. I would check on him and I would say to him, "You lied to me." I mean, I already went through high school. I mean, I already went and got an education. But if you want to lie to yourself that's what happens many times, people lie to themselves. So you got to first be honest with yourself and you got to be determined to accomplish what you want to do. If you are not determined, it's not going to happen. And how do you ingrain determination? How do you inject somebody with determination? I tell kids,

"People don't hire you because *te aventates* [you out-did yourself]." I mean they do, *verdad* [right], but let's say they don't hire you because you have a diploma. They hire you because you had the discipline to go to high school or you had the discipline to go to college. And people understand that.

Andres Rios

Andres Rios is the superintendent of Cuatro ISD, a 31,000-student district in the Laredo, Texas area. He, unlike the other study participants, has spent the large majority of his career outside of the Rio Grande Valley in North Texas. He was born and raised in South Texas, served in the National Guard Reserve and attended Texas A & I University. His wife graduated a year earlier than he due to his commitment to military service so he finished his undergraduate degree after moving to North Texas. After graduating, he found employment with a North Texas school district and worked as a high school English teacher. He expresses a unique difference from the other participants in that he's lived in a large city, been involved with racial politics and believes in not backing down from the confrontation that is inevitable in educational politics.

Mr. Rios' parents were natives of Laredo however the working-class, blue-collar family was forced to move several times due to his father's employment status. He states that they were influential in his and his siblings' academic success.

Interviewer: You talked a little bit about your parents, did they push you to do well? You were successful, was it because they pushed you or you had a natural inclination to do well?

Mr. Rios: No, no, my parents worked hard. My dad was the only breadwinner probably like in your family. Mom stayed home, took care of the kids and

everything. While neither one of them finished college, mom the 10th grade, he did finish high school and was excellent mechanic. He always said, "You all are all going to college. You are all going to go to college." I have an older sister, seven years older than I am, she was at UT (University of Texas at Austin) most of the time as I grew up so I really didn't know her. She wanted to be a pharmacist. And then after her, a sister that is four years older than I am, he also pushed them all into college. So, going to college was not an option. I knew I was going to college. I just didn't know where.

Mr. Rios expresses his belief that education is the way to economic advancement. He shares the example of his father, a hard-working, blue-collar employee who faced RIFs (reduction-in-force processes) because of his contract employment status in South Texas military installations. Multiple times the family was forced to move from military base to military base in an effort to find steady work.

Interviewer: And so at what point did you realized that education could have such an effect on helping with poverty and social change?

Mr. Rios: I grew up with it, that's what my dad said and so it was a no-brainer. You had to get educated. My dad would talk to me and he would talk about the white man and this and that. My dad worked very hard to get to where he was as a sheet metal mechanic or quality control inspector. He inspected all the helicopters that were repaired from Vietnam that came in a mangled mess. He would inspect them and they wouldn't go to the next level until he put his little thing on it. And I admired him so much because he would come from work and my dad was not a fighter, he would come from work *todo, todo* [all, all] stressed out. I would say,

> "What's the matter dad?" They were putting pressure on him to let them go through, maybe not quite ready, because they needed to get them back into action, and my dad would not succumb. He would not allow them to send forth a repaired item that was not repaired to specs. I know it drove him crazy because my dad was an eight-to-fiver. He liked to do his job, come home drink his beer and mow his yard. He was non-combative. So I was real proud of him for that. And like I said he always said, "You're going to college. Whatever you want to do, you're going to college."

As he describes his first experience outside of the South Texas, Mr. Rios explains how being removed from the "protective cocoon" of the region influenced his outlook and administrative philosophy. He states:

> Soon after we arrived in North Texas, a man was shot as a result of a police officer playing Russian roulette with him in the backseat of a car. I don't know if you remember all that. The city of Dallas was thrown into turmoil and riots happened in downtown Dallas. Police cars were burned and I wondered what the hell I had gotten myself into having grown up in somewhat of a protective cocoon among our people down here.

His first job in a North Texas school district found him struggling with racism, discrimination and prejudice issues. Mr. Rios could not reconcile the work ethic values he was instilled with and his belief that a strong will and self-determination could solve poverty and inequity. Throughout our interviews, he continued to reflect on the historical institution of racism and discrimination and his own value of hard work. He stated:

> Now, at that time I was teaching and I was not really in tune to the racial issues. I thought I did the Horatio Alger thing, pulling myself up by the "boot straps" and moved out of (the bottom rung of the economic ladder), my dad and mom always said be better than we are and so on and so forth. So I really wasn't in tune to the plight (of Mexican Americans, African Americans and other poor people). Now, the Raza Unida Party was kicking it's heals up. The Mexican American Student Organization, MASO[22] at Del Mar College in Corpus was beginning to feel its oats. I wasn't real comfortable with their methods. I was reading about Ramsey[23] and José Ángel Gutierrez[24] and all that stuff and I kind of had internal problems with that because I thought if you are going to do something work within the system, you know, somewhat naively.

Mr. Rios was most interesting in that he was the only participant in this study who had been away from the South Texas region for a long period of time. He felt comfortable talking about race and politics and the need for organizations to aggressively defend the issues important to Latino school children and South Texas school districts. I pursued this line of questioning by asking him if he thought his perspective was different because he spent his career in North Texas. He stated:

> I had to leave. And I'll give you case after case after case and most recently, even yesterday, I was in an airport in New York ready to catch our flights to come back home (from a conference) and there was a superintendent there from a small

[22] The Mexican American Student Organization was the precursor to the La Raza Unida Party.
[23] Ramsey Muniz was a leader of La Raza Unida Party and first Mexican American to run for governor of Texas in 1972.
[24] José Ángel Gutierrez was the co-founder of La Raza Unida Party, a third party alternative to the Democratic and Republican Parties of Texas. He later earned a Ph.D. and law degree and ran for U.S. Senate for the state of Texas in 1996. He is currently a professor of political science at the University of Texas at Arlington. He was originally from Crystal City, Texas.

district in Texas, Hispanic, and there are very few of us in this group, there are only three of us. And this is young guy and I was saying some things and somebody said, "What do you want to do?" And I said, "Well, you know, if I ever leave South Texas I'm going to have to kind of, I'd like to get back to the North Texas area because that's really home but I just don't" – there was an Anglo, a Hispanic and myself – "I just don't think there is any district in North Texas ready yet to hire somebody that looks like me." And at that point the other young man who is Hispanic said, "You know," – he kind of smiled – "I hate to think that you have to consider that but I may have to also." Now, he's *guero* [light-skinned person], he's light-skinned, he said, "But, is that real." And I said, "Joe, we'll have to get a case of Pepsi colas and talk and then we'll have to go get some more because I can tell you stories after twenty-eight years in North Texas." So in answer to your question, what I see here is somewhat of a cocoon. You know, everybody looks like everybody else – not only in Laredo but in South Texas – but as I see them traversing the Anglo-dominated world, while we make a lot of noise we don't always impact because the white man has learned how to deal with the brown man. And I saw it in North Texas day after day. *Si no tiras chingasos, no te ponen atencion*. [If you don't throw punches, they won't pay attention to you.]

Unfortunately, you look at the – you know, Martin Luther Kings's way obviously was very impacting – but then you look at the (Black) Panthers and you look the Chicago Seven and you look at José Ángel Gutierrez, that had an impact. Because the other way, they know how to work with you. They'll know how, I

saw it in North Texas constantly (emphasis) when the Chicanos would rise against a deal, the established Chicanos, the attorneys would go in and talk to the powers that be whether it was the mayor or the city council or the school board, (making fighting sounds) and they'd go, "You're right, you're right, here's a bone." And they'd walk out, "Hey, yeah we took care of that. We…" Tomorrow nothing changed. But they showed and the postured and they showed in the paper (hitting his fist) that they were to talk to the superintendent or the mayor and "by God, we took care of business" but nothing changed.

And so I say things to some of my new friends down here, because they operate differently here, and so I say to them, "Guys, as we work through becoming more of a force in Texas public school finance issues don't be swayed and don't be fooled by their ability to tell you we want you to be a part." I watch them, I watch them work and some of my pals here have a tendency to get satisfied when they say – it's the old "some of my best friends are Hispanic" syndrome – those guys (the white establishment) know. They jump over three or four of us (Mexican Americans) before breakfast and never break stride. They know how to deal with us because we are satisfied after we punch, even though we didn't hit. I'm not advocating violence but I am advocating an aggressive presence. And so, did I have to leave to see (the injustice), yes. There were a few of us in North Texas that fought, fought, fought within the system all the time for the Latino kids and teachers and administrators. We had to claw our way in. Unfortunately, realistically, we were the last ones in and first ones out when RIFs (reduction-in-force practices) occurred.

The participants in this study grew up as migrant farmworkers, most as sons of immigrant parents, all in poor and working-class families. They identify strongly with their work ethic values to the point that it is difficult to deny or realize anything different. As Mr. Tamez stated, "It's embedded in me." They were raised during the 1940s to the 1960s, a time that allowed them to witness and participate in the Civil Rights Movement, La Raza Unida Party, and the Vietnam War. They are educational leader-"firsts" – first in their family to attend college, first "local" boy and first Mexican American to lead a school district, and among the first influx of educated and middle-class Mexican American young adults. Family support and a belief in the educational system as a way to economic advancement are themes that are common to each of their stories.

Political Acumen and Advocacy

The second major theme that emerged from the participant interviews and observations was the superintendents' understanding of politics in education and the importance of being politically active on behalf of their region and school districts. The participants have a tangible belief of the centrality that politics plays in the educational administration practice as well as the inherent political nature inherent in formulating and implementing education policy. I first attempted to gauge their understanding of politics in education and found that the local politics of "running a school district" – administrator-school board relations, addressing parental concerns and managing the day-to-day operations of the district – are vital to their understanding of political activism.

"Not letting that current take you"

The study participants were chosen because they had in the past been "politically-active," having testified on behalf of their school districts and the STAS. They also had

been involved in leadership positions in administrator and statewide district organizations and organized Valley districts for action. So when I met with the individual superintendents, I broached the subject of politics in education. I wanted to understand what their perceptions of politics in education were by first asking if they felt that politics in education existed and if so, what they felt about that. The majority of participants responded by explaining that politics did exist and then proceeded to explain their understanding from a micropolitical perspective – explaining their conflict with school boards, how the business community needed to be "brought along," and how relations with staff, teachers and parents were essential to running their district effectively.

More than the other participants, Mr. Tamez and Mr. Rios communicated a frustration towards the political process within school districts. They hold negative conceptions of politics, equating it to the "dirty" politics label ascribed to it by many. Unlike the other participants, it wasn't necessary to ask Mr. Tamez about politics outright. As soon as I sat down in his office he asked me about the Congressional redistricting fight in Austin.[25] He began by stating, "*Lo hicieron* [They did it] (passed a redistricting bill), in spite of anything, school finance is going to be done the same way." As he saw it, the Republican-dominated political establishment controlled the legislature and governorship and they would soon re-create the school finance system to their liking. Despite his pessimism for a fair outcome to school finance policy, he explained how he

[25] At this time the Democrats were attempting to block a Republican-led effort to re-draw the Congressional boundaries. The Texas House Democrats first fled to Oklahoma and were able to keep the Republican majority from passing any legislation during the regular legislative session. The Texas Senate Democrats were then forced to flee to Albuquerque, New Mexico after the Governor Rick Perry (Republican) called a special session to deal with the issue. The Democrats stayed for a month, avoiding Texas Rangers who were sent to "round them up" and forcing the governor to call a subsequent special session. The Republicans were able to pass the changes. The boundaries were subsequently approved by the U.S. Attorney General's Office.

had been active with a statewide organization that fought for equity. Later in the interview I asked him about the existence of politics in education. He did not follow-up with a macropolitical explanation of state-level issues of organization, conflict or power as he had initially considered. Rather, he inserted an example of school board politics and the harm it can have on administrative practice and schooling in general. Mr. Tamez stated:

> I think having politics within the schools is probably the worst chemistry anywhere. There has to be another system. *Ahorita* [Right now], not, not my district, but I hear so much of board members really benefiting from contracts, buildings, construction, insurance. Politics is probably the worst thing for academics and probably the worst formula for any community and the schools.

Mr**.** Tamez understands that the schools belong to the community and the school board representatives are the stewards of the public's trust, but he is troubled by the contradictory and prohibitive nature of school board power has on his leadership. As he stated, "There has to be another sense of operating schools. Now, on the other side, *dicen* [they say], 'Well, the schools belong to the public and it's their kids, their money, their campus or their facilities.'" Although he stated that school board-administrator conflict does not occur "in his district" he continued by giving specific examples of a breakdown in the school board governance process.

> **Interviewer:** Do you think there needs to be more (school board and administrator) education on how the political system works?
>
> **Mr. Tamez:** I think there has to be, and you know, even (college) educated board members are probably just as worse as the noneducated. *Pero* [But], ignorance is

> probably the worst evil to schools. A board member who thinks he knows curriculum because someone told him, *me intiendes* [do you understand me]?
>
> **Interviewer:** Without knowing the research or the practice?
>
> **Mr. Tamez:** Right. No. And when football and cheerleading and who gets the contract for the health insurance is more important than academics, *entonces* [and then], ah, no, if you ask me I don't think politics has a place in schools.

Mr. Rios was similar in his perception of and discontent with local school board politics. His first response to a question on the existence of politics in education was to mirror the micropolitical understanding as laid out by Mr. Tamez. As we started our interview, I asked about the role that politics plays in educational administration and the schooling process. Mr. Rios stated:

> I think politics is one of the most distasteful parts of this job and if we could operate without it we would almost be utopic, if that's a word. Unfortunately, and everyone wants to dip their fingers in schools, everybody knows how to do it better, everybody went to school so they have an opinion…I've learned things since I've been here but I would wish the same thing would happen to us and they (local school boards) would let us (administrators) run our districts. Politics is an unsavory partner.

Mr. Rios' beliefs are informed by his involvement in internal district politics at his previous North Texas school district. He is not shy about proclaiming his penchant for fighting for the rights and equal treatment of Latino school children and shared an experience he had with a colleague in which they "uncovered inequities in spending, in allocation of monies for certain schools compared to other schools." He sees the political

process more as a personal, individual-level process in which the imagery of "punches being thrown" by combative sides is vivid. As he stated:

> We ripped the lid off of that (inequitable campus-level funding). If there were issues (about equity) to be stated he and I were always standing out in the forefront, within the system of course, but they (the established power) always recognized us. Now there was a large cadre of Hispanic administrators who know we would speak up, consequently we were the ones always taking the *chingasos* [punches] – letters of reprimand here and there, this and that, so on and so forth. But we always knew our mission was pure. We lost many battles. We have many scars. But I think we won our fair share too.

Although Dr. Treviño is also cognizant of the importance that the school board-administrator relationship plays in local-level politics, he holds a more nuanced understanding of politics in education. He first responded to my question about the presence of politics in the education by stating, "I guess there are different levels of politics first of all." However he immediately elaborated by citing important aspects of his responsibilities as superintendent from the same micropolitical perspective used by others. Dr. Treviño stated:

> Just by the nature of the job, yes, you do get involved with the politics of running a school district. And I say different levels, I mean, working with school boards is always a challenge, wherever you are, wherever you are superintendent. There are politics involved there. One of the things that I think I've been able to do is work well with people first of all and to work well with the different personalities, the different individuals on the board. And the players change. You have a new

> election, a new board member comes on board or a new board member is appointed if there is a resignation. But I've learned how to work well with everybody. I think a superintendent has to have a good relationship with the board. That's a must if indeed, remember what I said a while ago that I wanted to impact the educational system, well in order to be able to impact the educational system you have to have a good working relationship with the board or else you are not going to be able to do what you want to do. It's always an issue of compromising and making sure that yes, the board is there to give you direction, they want you to do a job. And so, you're there to do that job that they want you to do. With that, of course, implement and make the impact that you want to in the school district.

He expanded further on a micropolitical understanding of his responsibilities by citing examples of parental involvement and staff morale as aspects of his job as superintendent, however his stressing of local government and business outreach efforts were key to his understanding of the political. Dr. Treviño detailed his efforts to cooperate with local government officials and inform his local business community in an effort to forge positive relationships. He states:

> I think in the community it's political from the aspect that you've got to work with the city, the different agencies that you have around you, county, some of the service agencies as they relate to providing services to the students, plus the business community. Here in this district, because it's the largest school district in the area, there is always a focus (by the business community) on what's going on in our community and in our district. Part of the job, I think, is to work with our

business leadership, go to the (chamber of commerce) meetings, make the speeches, give a status report as to how we're doing, or what improvements need to be made. So the job just calls for that.

Like Dr. Treviño, Manuel Lira sees politics in education as a vital aspect to accomplishing his goals as a district and meeting his responsibilities as superintendent. While his understanding of politics in education comes from micropolitical conceptions, Mr. Lira differs from the others in the direct connection to managerial and effective leadership skills. As he states, politics is "a very important aspect of an administrator and even more so today is having good people skills. You gotta learn how to work with people." His strong administrative and managerial focus is further evident when Mr. Lira is asked about the varying levels of politics. Thinking that my question would lead more to a discussion on macropolitical (state-level) or micropolitical (local or district-level) issues, he gave a further breakdown of the local-level political landscape in his district by citing community and staff relations.

Interviewer: Is that (the importance of understanding politics in education) because of the politics that is involved at every level?

Mr. Lira: There is politics at every level and you are being challenged all the time. So you have to use diplomacy, but you also have to have integrity. You still have to make good decisions because everybody is looking. You are always in the spotlight. Everybody is looking at you. You always have to refer to policies to make sure that you make good decisions. I think that's important, that you follow the policies that are in place. And when you can't help a person, then you need to refer to policies and say, "Look, I can't help you. I wish I could. But this is the

policy that we are under. If the board changes those policies then by all means, we'll help you."

Mr. Ybarra shared an experience he had that best exhibits the notion that a micropolitical understanding of the politics in education is essential to the superintendents' success as administrators. It also demonstrates how the superintendents use their daily experiences as tools in teaching and reflecting upon their responsibilities as leaders. He concludes by critiquing administrators who refuse to "eat crow" when they are wrong or failed in leading effectively. The example he shared remained fresh in his mind. The fact that his district's football team was currently preparing for a first-round playoff game may have played a role in bringing his feelings to the forefront.

José Ybarra was principal of a high school when he noticed two young men walking around campus in between classes. He began by stating:

> You know, when you are in the business Enrique, you get to sense things, you get to know things, and the high school has a big open commons area. And I happened to be over there one day, just looking around, just like always and I noticed these two (boys)…something told that something was not right. And so, I went to the office and asked the secretary to bring those two schedules, I wanted to know where they were (supposed to be) at. I told her, I want you to go, take a note to that teacher, just have the teacher say yes or no, is this student in your class. *Pues* [Well], no, they had asked to go to the bathroom. So I went to the bathroom, and they were sniffing. Our best running back and our best receiver on the last game that was going to decide the district title. And the AD (athletic director) and the coach had told me, "Mr. Ybarra I do whatever needs to be done

> if you respect me and not bring up any issues other than critical issues on Friday afternoon because then I get disrupted and I can't concentrate on the game." Fine. So I called him about three o'clock and he says, "You don't remember our agreement?" I said, "Yes, sir. I remember our agreement. But this is important and it involves two of your players and you better get over here." So he came by. I had so much pressure during that time. The game was horrible because everyone was blaming me for it. We lost by one point because I didn't allow those two kids to play. And everyone kept saying, "You know, you can take action – Monday." I said, "You know what, I'm not going to allow those kids to go hurt themselves or hurt someone because I know." And I said I'm not going to put it off. Even the superintendent called. He was the one that hired me. He calls and he says, "Can you change your mind about that or the time your going to discipline those kids?" I said, "You're my superintendent you can change it." He says, "It'd be crazy if I changed your decision because of that." And I said, "Well, that's where I stand *mano* [brother]."

He proceeds by describing "about 48 hours of hearing with the board", a result of the players' parents hiring of a "real high-society lawyer out of Harlingen." He continues:

> And I said, no, I know what I saw and I know what I observed. I sent it off to the sheriff, they did a little test, they said it was cocaine, in fact, they said it was good stuff. And I said, "I'm not going to allow (them to play)." And when you make those decisions, I mean, and yes, sometimes we're going to be wrong. You know, I think sometimes we as superintendents or administrators ought to not have any problems eating crow, if we're proven otherwise. It should be. And unfortunately

sometimes we have people that want to cover something, and once you start covering, you done lost it. You done lost it. And so you gotta be able to make those decisions and stick by them. Knowing that there is consequences up there, I mean, there are consequences out there.

After Mr. Ybarra shared his experiences as a principal and the negative aspect of court and school board proceedings, I asked him if politics should be a role in the superintendent's responsibilities. He returned to the micropolitical understanding of politics exhibited by the other participants.

Mr. Ybarra: Let me tell you Enrique, first of all, I have always said that I will never be involved with politics and a professor of mine (once told me), once you get to be high school principal you'll…

Interviewer: Because of the politics of the school right (as you just explained in your previous story)?

Mr. Ybarra: Well, because of the politics in the school, because of the community, because of the politics with the board. When you get to visible positions, you know athletic director is an example, high school principal is an example. I mean, those people are under the gun all the time. And so,…

Interviewer: Football coach?

Mr. Ybarra: Yeah, I mean constantly, they're there all the time, you know.

Mr. Ybarra concludes by stressing the need to learn the political process, the importance of strong and effective leadership and the danger of not getting caught up in the "current" that was so evident in his experience with the two football players. He plainly believes

that it is essential that superintendents learn how to be political beings and participate in the political process in their local community. As he explained it:

> You have to begin to learn the politics of it. And I think what one needs to learn is ***how*** (emphasis) that works, not that you're going to be jumping on that current and letting that current take you. Because you as that principal or as the administrator have to be able to have enough confidence in yourself to know what you are doing and to know that you're doing is the right thing, regardless. And so, yeah, the politics, is that the superintendent's kids or the board's kid or the teacher's kid or somebody influential that when you apply rules sometimes they think those rules don't apply to them, you know. And I've been criticized of biting the hand that feeds me, but when I make a decision, you know, I believe that that decision is sound and if somebody can show me otherwise, be more than glad to accept that.

Becoming "Mr. Small-School Formula"

While José Ybarra and the other study participants concentrated their discussion of politics from a micropolitical perspective, they also have a depth of understanding of the macropolitical system. Macropolitics is not given less importance nor looked upon as a lesser school leader responsibility. Rather, the macropolitical perspective is conceptualized on a different plane. While all superintendents are "forced" to deal with community, parental and board political issues, the level of their participation at the state level is purely an individual choice. The study participants believe that state-level involvement is an essential dimension of being an effective school leader. They are keenly aware that their involvement at the macro or state-level is necessary to insure that

their voices are heard by state policymakers and leaders. They are involved with statewide organizations such as the Texas Association of School Administrators[26] (TASA), Texas School Alliance[27] (TSA), the Equity Center[28] and the South Texas Association of Schools (STAS). As part of their responsibilities at the macropolitical level, they cite activities such as representing the region and their district on the organizations, testifying on behalf of their district and region, and cultivating relationships with legislators as being of utmost relevance.

One example of the importance given to superintendent participation at the macropolitical level is portrayed by Andres Rios. Mr. Rios does not feel that the ideal role of the superintendent is to be involved in state-level politics, yet despite his hesitance to endorse this type of leadership role he quickly reiterates the importance of it. When I asked him if the superintendent's job should include state-level advocacy or political activism he states:

> Should he? Probably not, we're teachers. Would we behind the eight ball if we didn't? Yes. So we have to be aggressive, we have to show a presence. Again, back to what I said, we have to not only find the door to knock on but we may have to kick it in. The organizations to which I belong, the different committees that I'm on…I'm very pleased. Actually, I'm on the TASA legislative committee and Dr. Treviño is on it and I'm on it and a couple of other Hispanic

[26] The Texas Association of School Administrators is a statewide organization founded in 1925 and represents public school administrators, education service center staff, and education professors and researchers. An Executive Committee consisting of 4 officers, 20 regional representatives, and 4 at-large members governs the association.
[27] The Texas School Alliance is a coalition of the largest school districts in Texas. The group advocates in the legislature on issues affecting its members.
[28] The Equity Center is a non-profit organization headquartered in Austin, Texas. It represents low-wealth and mid-wealth districts from all regions of the state. Its mission is to provide legislative representation and analysis on issues of equity, fairness and adequacy in school finance policy.

superintendents, one from the Valley and Mike Hinojosa from Spring (in the Houston region).

Similarly, Manuel Lira participates in statewide organizations and believes that superintendents "should be actively involved." Mr. Lira conceives of this issue from a macropolitical perspective and views the political activism practiced by superintendents in terms of winners and losers. When I ask him about the duty of educational leaders to represent their districts, he explains the vulnerability of Valley districts if they do not participate. He states:

> I think that all school districts should lobby for what they believe is right. Texas is a big state with wealthy districts, not so wealthy districts. But I think that the majority of school districts are in needs, and some more than others. Some have more wealth than others. I think that equity is a big issue. I believe that if you don't speak out, you're left out. You do need to speak in regards to what your needs are and if this particular bill is being introduced, how it will have an impact on your school district and the surrounding school districts and other school districts that have the same factors that you do. And if you don't speak out, nobody listens.

Mr. Ybarra is one of the charter members of the South Texas Association of Schools. He cites an example of his involvement as a new superintendent at a small school district in the South Texas as evidence of the benefits gained by speaking up, advocating for his community's interest and becoming a political player in the macropolitical or state-level system.

Interviewer: What about the politics at the state level? You are talking about district politics and campus level politics? Do you believe that superintendents have the time or should make the time to be involved with state education policy?

Mr. Ybarra: Well I think that they need to make the time to do that. The first time I got involved at the state level was when I was a superintendent at a small Valley school district. We belonged to TARS, the Texas Association of Rural Schools, I believe is the name of the organization. It was all single A districts, not only from the Valley, but from everywhere. And we would look at particular issues and we would go and testify before the committees in reference to those issues…Because we looked at, these are the issues that the small districts have, and we're going to stand by them and we're going to make sure everybody understands and knows that when legislators make a decision its not because of lack of information from our part anyway. And so, we were very actively involved. That's the first time that I started working with that and beginning to understand how, in essence, we can do those kinds of things and how we can impact. You know, our legislators are like anyone else, they have certain amount of information, have some personal things (or personal stake in the legislation) and they have some certain amount of information…That's the first time that I began to do that. Matter of fact, among the Region One superintendents, they used to call me "Mr. Small School Formula." (Laughter)

Because the TARS school districts would have been negatively affected by a reduction or elimination of the state funding weights for small schools, the argument made by many small and rural districts is for additional funding and aid in operating smaller school

districts. Mr. Ybarra clearly was proud of his outspokenness and his being known as "Mr. Small School Formula."

Once he became "Mr. Small School Formula," Mr. Ybarra was identified as a legislative leader. When he went to work for Brownsville ISD, one of the biggest districts in the Valley, as an assistant superintendent he was asked to testify on behalf of the district because his superintendent "knew that I had testified before (so) she would send me to some of the superintendents meetings especially when we started to talk about facilities." Mr. Ybarra highlights how he was able to argue his point to the legislative education committees, concentrating his testimony on real-world accounts of challenges faced by his district. He found this to be a helpful strategy in demonstrating the difficulties that the district operated under. I asked him how long he had been testifying about the need for state assistance on school facilities and whether he ever thought school districts would receive assistance from the state.

> **Interviewer:** How long have you been testifying on that one (the facilities issue)?
>
> **Mr. Ybarra:** About twelve, about twelve, thirteen years…But, but, twelve years ago if you would have asked any superintendent that one day we were going to have state funding, we would have said, "Hah, no that's not going to happen." Well, it happened not only because of the lawsuits, because of the court, but because a lot of the superintendent were also working at it, organizing, talking to legislators, making them aware of it. You know, I used to love it, and I still remember some of the quotes from Brownsville that I would give before, testifying before a committee, and at that time I testified before the House and the Senate. It's about the need for facilities. You know, Brownsville had so many, we

had 500 portable buildings, housed over 12,000 kids, more kids than half of the average schools in this state (they had more kids in portables than half of the average-size schools in the state). And yes we have portables, and yes we have them there, but when you have a facility that is built for a 1,000 and you have 3,000 kids, then you don't have the library facilities, you don't have the cafeteria facilities, you don't have the bathroom facilities, definitely don't have the hallways or anything like that. And so, ah, we were very involved, and the Chamber of Commerce in Brownsville was very involved with that, and we brought in representatives, through (Texas State Senator) Lucio of course, you had to have the contacts, and (Texas State Representative) Oliveira, and they were members of those committees. We would bring them and we would show them around some of the buildings and see what was happening.

Henry Tamez is a vice-president with the Equity Center, regional representative with TASA and a founding member of the STAS. He echoed Mr. Ybarra's contention that legislators benefit from the local-level, practice-oriented information being provided by school administrators. He states that because superintendents are on the "front lines" they are uniquely qualified and positioned to provide the best information. By not remaining active, he believes that superintendents disadvantage their constituency and risk being left out of the macropolitical process that writes laws and funds schools. As he stated, "I keep telling my colleagues that you need to get involved at the Austin level if you want to do anything for your district." He encourages his colleagues in the Valley to become involved with statewide organizations and cites his involvement with the Equity

Center as example of the monetary and time sacrifices he and his district make to be actively involved.

> **Interviewer:** How important is it for the superintendent to play a role at the state-level?
>
> **Mr. Tamez:** We want to let our legislators know really what is happening at that front lines. And if it wasn't for the superintendents, they would never see it. No one sees it but ourselves. And the politicians at the state level, they have to hear it from somebody and really I think the best voice is the superintendent because we get wind of everything, what works, what doesn't. I keep telling my colleagues, *de que* [that], you know, *ayer* [yesterday], I was in Dallas on a Equity Center meeting, *nos costó dinero, me costó tiempo* [it cost the district money, it cost me time], but you gotta get involved.
>
> **Interviewer:** You gotta be at the table?
>
> **Mr. Tamez:** You gotta be at the table. If you're not at the table, you might as well just come to work everyday and see what happens. *Este* [Ah], it's very important. And as superintendents I think part of the role of the superintendent is to be involved at the state level. And you know that has never been, I don't know if a lot of the universities as far as the master's program, I know when I went during my master's program, I did the facilities, the finance, but never the involvement of state politics.

Mr. Tamez also takes pride in the role he and other superintendents played in fighting for facilities funding. The Instructional Facilities Allotment (IFA) program that he mentions is an instrumental funding source for districts not able to afford facilities solely on their

local tax base. All the participants and many school districts in the Valley receive funding from this source. He attempts to stress the importance of state-level involvement by sharing how they traveled to Austin and waited for hours so that they could testify to the need of the program. He states:

> If it wasn't for four or five of us, Homero Diaz (a retired superintendent), Dr. Treviño, myself, José Ybarra, we testified I remember that night, it was at 1 or 1:30 in the morning, that changed the whole IFA perspective. From that meeting, they set another committee meeting, and that was really what changed IFA. It could have died three years ago. It kept on. Only because of us, the superintendents.

Joe Treviño is a founding member of the STAS, a current vice-president of TASA, and his district is a member of the Equity Center and the Texas School Alliance. He believes that part of the superintendent's role at the state-level is to advocate legislation that will benefit students. Dr. Treviño fosters his relationships with his legislators, informing and updating them on their legislative agenda. As he stated:

> The superintendent's job also relates to working with your legislators whether that be the senator or your representatives. We happen to have three representatives because of our geography that represent us in Austin. And so, I make a point to know them and for them to know me. I make it a point to review with them what positions we're going to take as a district, to review with them what is important to us with regards to legislation. I, every legislative session, go to Austin two, three or four times in addition to the other meetings that we have as

> superintendents, to plan what are legislative agenda is going to be. So, there is politics involved in that.

Dr. Treviño struggles with the disconnect that exists between what public officials support and what his local business community advocates. As he stated, "It's difficult because they, the representative or they the senator represent the people and sometimes what the people wish for or what the business community wishes for may not be totally aligned with what district wants." He understands that he must observe and evaluate this process from a macropolitical perspective and states that "you have to understand that and work with that and as much as you can, push for what you believe is the right agenda for kids."

Chuy Gutierrez has been active in statewide politics since he was a young adult. When asked if it is part of the superintendent's responsibility to be involved with politics at the state-level, he quickly retorts, "Oh yes. If you're not involved, if you don't make an impact or have input into what goes on at the state, then you get less of what you should. Of course (you should be involved)." Mr. Gutierrez is active as a member of the executive committee of TASA and representative for Region One. He states:

> I like it there (on the TASA executive committee) because you have people from Plano, people from Lubbock, from El Paso, from West Orange, and you can go on and on. They all talk about their district and what it is best for their district. We don't want to be left out. If you are not part of that and if you are not outspoken, they kind of cut you out. That's the way it works. That is the way it works.

Mr. Gutierrez finds it "unfortunate" that "we have to educate our legislators." Nevertheless, he meets often with his representatives and discusses district and regional

concerns. The relationship-building that Dr. Treviño and others speak of is also evident in the way Mr. Gutierrez explains visits with his representatives.

> **Mr. Gutierrez:** I'm very close (with them). Yesterday I met with (Texas State Representatives) Juan Hinojosa and Kino Flores here in Mercedes. They happened to be there for something else and I talked with them. The day before we were with Juan Hinojosa talking at the (University of Texas – Pan American) university. Every opportunity we meet with these guys and tell them, "This is the way it is." They have an idea, they have an idea of what it is that they need to fight for us. I have a lot of respect for our new senator, Juan Hinojosa. I don't have much respect for some of our state reps, but that guy's heart is in the right place and he is going to do the right thing for our school districts.
>
> **Interviewer:** But you need to remind him of your situation?
>
> **Mr. Gutierrez:** Exactly. And tell them exactly what it is that is occurring. We have to look at the current school finance system that we have in place and explain to him, "This is what we feel is working and this is what's not working." He understands all that. But if we don't stay on top of things and we're not with him right there to guide him – he means well all the time, he votes right – but sometimes a bill can have something snuck in there that is not good for us. And yet, he doesn't understand it. So, yeah, it's a never-ending cycle.

<u>"Grouping us as superintendents versus just one"</u>

Dr. Treviño, Mr. Tamez, Mr. Ybarra and Mr. Muñoz make reference to their participation in the initial formation of the South Texas Association of Schools as we discussed their state-level political participation. As I initially began to select participants

to study, I became aware of this active organization in the school finance reform discourse. I conducted preliminary analysis of legislative testimony and found that the majority of superintendents testifying on behalf of their districts and the organization were Mexican American. Simultaneously as part of my position with the Texas Education Agency, I had the opportunity to speak with several of the participants as it related to their facilities funding applications. I began to notice the group's political cohesiveness and presence in important legislative hearings dealing with school finance issues. Why was the group formed? What legislative issues were driving advocacy? And what was the group's main purpose?

Speaking with some of the founding members of the STAS, the need to have one's voice heard was repeated during our conversations. For example, Dr. Treviño explained the purpose of the group and detailed the political clout that can be used by a coalition of districts standing up for the rights of poor districts. He stated:

> Well, we ah, superintendents wanted to get more involved and have greater influence and have greater impact on the legislative process particularly as it relates to school finance. So, the Valley superintendents decided that we ought to form an organization amongst the school districts that would focus on legislative positions, focus on the legislative process, and with that unity then be able to represent the interests for poor school districts, poor children in a united fashion and be able to open up doors for us whether we go speak to whatever representative it is, we can say that we represent the thirty-eight school districts in the Valley.

Dr. Treviño notes that the coalition initially only represented the Region One school districts but soon expanded "to include about twenty-two school districts in Region Two so that gives us, you know, about fifty school districts. Actually, sixty school districts that represent Region One and Region Two." As he sees it, the ability to visit legislative representatives with a contingent of sixty provides the necessary political clout to be heard. As Dr. Treviño explained it:

> So when you go to an office whether it be a senator or a representative and we say, "We represent sixty school districts. And this is our legislative position." That they are able to know that and then work with their colleagues from the Valley, from the Region Two area, and know what interest we have for our children and our area, I think it's had a great impact and we continue to be very active with the organization. We continue to talk, discuss, set-up our legislative agendas and work at influencing the legislative process.

Henry Tamez was also present during the formation of the STAS. He echoes the issues of voice and the need for political clout that Dr. Treviño introduced. Mr. Tamez however highlights the commonalities shared by Region One and Two districts by outlining some of the issues that must be understood by legislators as they deliberate and legislate reform of the funding system.

> **Interviewer:** Can you talk about the South Texas Association of Schools? Its origins? Your involvement?
>
> **Mr. Tamez:** I was involved since the inception of it. A lot of it was to have a voice. We (the districts in Region One) had probably the biggest factors for no success, as far as the testing side, the migrancy, the bilingual, the poverty, and we

had to make those people (legislators) aware *de que* [that], hey, there were circumstances *aquí en el Valle* [here in the Valley] that were creating some issues. I mean there was finance and we formulated (the organization) really just to get a voice. We had to formulate a group of people that could talk to our legislators – (Texas State Senator) Lucio, (Texas State Representative) Jim Solis, (Texas State Senator) Juan Hinojosa. And grouping us as superintendents versus just one, I think we had more clout that way. That's what it was – formulating clout.

The primary legislative issue testified on and advocated for by members of the STAS is school finance. I asked another founding member of the group two questions regarding the group's legislative agenda and group representation. From earlier testimony Mr. Muñoz had stated that the group represented the "poorest of the poor" so I wanted to follow-up on that idea. He mentioned the obvious demographic makeup of the Valley districts.

Interviewer: You talked to me a little bit about this earlier. The specific purpose of the organization is to do school finance-type legislation?

Mr. Muñoz: Primarily.

Interviewer: Primarily? And you represent pretty much the poorest of the poor?

Mr. Muñoz: Poorest of the poor, yeah. Well, we definitely represent districts that are high percentage Hispanic. My guess, and I've never looked at, but my guess is when you look at what are wealth per student is, property wealth, we're among the poorest of the poor. I'm pretty sure, in general speaking, when you talk about Hispanic, 80 or 90%, who are poor, we're it. We're it, percentage-wise. Now for

example, Dallas may have more Hispanics that we do, Houston may, by number but not percent. So, when we look at percent, we have that.

In a similar manner that racial makeup was mentioned as cohesive element of the group, José Ybarra injected border issues into the discussion. Explaining how other groups of districts were attempting to gain admission into the STAS, he notes demographic similarities and regional proximity as important factors that impact increased admission of districts.

Interviewer: Why was the STAS formed?

Mr. Ybarra: It was formed to make sure that our voice was heard about the needs that we have in this area. Now San Antonio has been trying to come (in), especially Dr. Olivarez (superintendent of San Antonio ISD) and his district has been trying to become members of us and we have said no because we want people who have demographics like we do because we don't want to lose sight of what we're doing. So two years ago, we invited Region Two, the Corpus area. Now we have, I believe 22, 23 school districts from their 40 districts that are already members because there is a lot of similarities. Now, we have talked a little bit, to people at El Paso area.

Interviewer: Along the border?

Mr. Ybarra: Yes, sir. And there is a lot of similarities there but because of the distance we are not yet (ready to admit members from the area). The last, last year or so we said, "Look, we can help you get started in your area, and then maybe you can become a cell group there and a cell group here. And then maybe once a year we can meet as an organization…"

Dr. Treviño also agreed with the contention that demographics were the primary factor determining group cohesiveness and organization. Dr. Treviño concludes as did Mr. Ybarra that an increase in members is likely.

> **Interviewer:** How big an issue in maintaining a strong organization is the fact that major similarities in demographics exist? Is that main aspect keeping you all together?
>
> **Dr. Treviño:** Yeah. No, I think that we do have a lot of similarities. And so, that's why I think that in the future there would be one organization that would represent El Paso, San Antonio and the Valley. I think that's possible. I think we share the demographics. We share in the programming that we need whether that be bilingual ed (education), special ed (education), the weights that we have, the compensatory ed monies that we get.
>
> **Interviewer:** You all would be affected similarly if, when and if something happens with school finance?
>
> **Dr. Treviño:** Oh yes. Pretty much, you know, you think of and I hate to keep making the distinction between Chapter 41 (property wealthy) and Chapter 42 (property poor), South Texas while it is not exclusively Chapter 42 school districts, I'm going to say 85% of us are. And, the other 15%, and I'm making those percentages up, I haven't calculated it.

In some of my interviews with the superintendents I began to sense a discontent with the leadership of the Texas Association of School Administrators (TASA). In the previous legislative session, they endorsed a bill by Chairman Grusendorf (a Republican representative from Arlington in North Texas) that would have eliminated the current

equalized system of funding without having another system in place. The bill would have also negatively affected districts in the Rio Grande Valley, as well as other property-poor regions of the state. TASA has been led historically by white, males. I attempted to ask the participants of a potential rift between districts from the Valley and the TASA leadership as a reason for the formation of the group. Chuy Gutierrez and Andres Rios were the two superintendents who exhibited the most discontent with the TASA leadership and its exclusion of districts from the Valley in legislative decision-making processes.

> **Interviewer:** From what happened in the past session, there seems to be a rift between the STAS and TASA. Also, in examining the pictures and names of the people on the web they are overwhelmingly white, male and not from the Valley.
>
> **Mr. Gutierrez:** Yeah. I'm on it (the TASA executive committee) and the guy from Alice.
>
> **Interviewer:** Do you think that's why the Association down here had to be formed?
>
> **Mr. Gutierrez:** Right. Because TASA did not represent, you see, we've changed things since then. It has been through the South Texas Association of Schools, because here we are, Region Two especially the Corpus Christi area and the Alice (another Mexican American superintendent) area and those people, San Diego, and you can go this way (pointing south towards the Valley, then west towards Laredo). You know these people have, *mas o menos* [more or less], the same population as we have as far as ethnicity is concerned. They are mostly Mexicanos and mostly poor. So we joined forces to have a bigger impact when

we go over there (the legislature). We're talking not only thirty-nine school districts, but now we're talking sixty school districts. That's a fifth of the state, if you will. And we go over there and tell them, "What you guys have told our legislators is not good for us." And see, they have things like, they were wanting to cut deals as far as adequacy and equity. To us, equity is what it's all about. They use the word adequacy rather loosely. To us, adequacy is not, is not synonymous with equity – to them it is, to us it's not. They are kind of telling us, "*Ustedes, los Mexicanos* [You, the Mexicans], because you don't produce as much money, local revenue, we'll bring you up to a certain level which is adequate." And we're going like, "Why?" Why should our level be adequate at a different level than Plano or Garland Park or whatever.

Andres Rios uses a more personal example of an inherent disrespect by TASA leadership towards superintendents and districts from Regions One and Two. In describing a scenario that he and other STAS leadership experienced during the legislative session, he specifically blames the executive director of TASA as the culprit of the unresponsive relationship between TASA and the Valley school districts. He further advocates that STAS take a more aggressive posture in dealing with statewide organizations. Mr. Rios affirmed my contention that a rift existed between the two groups and then proceeded to explain how the rift had been subdued to an extent.

Interviewer: Didn't that change? I know there was a rift between the Association and TASA?

Mr. Rios: We did it. We did it. I went to Johnny Veselka (Executive Director of TASA) and I said, we were at a table at the Texas Club in Austin going to one of

> those meetings to visit legislators, *puras moscas* [a bunch of flies] sitting around the table there. There were ten of us to go beg these legislators to give us a bone. And Johnny Veselka walks in with TASA, Mike Hinojosa was with him and two other Anglo guys walked by. Mike said hello and all that stuff and Veselka who is the executive director of the association of Texas administrators, that is supposed to take care of everybody, didn't have the courtesy to come over to that goddamned table and say, "Hey guys" – of which we are members. That's all it would have taken. So I went up to him and introduced myself. But see, these guys (superintendents and leaders from the Valley) don't understand aggressive. In North Texas you have to be aggressive *si no te muchacan* [if not they'll run you over]. It's a whole different *onda* [way of life]. My wife tells me, "You need to back off down here." For twenty-seven years I've done this, I only know one way and that is right between your eyes.

Others like Manuel Lira were cognizant of the regional inequities ascribed to the Valley region. He also felt that forming the STAS was "a great idea" because he felt that for "many, many years the Rio Grande Valley has always been left out." He characterized the neglect in the following way:

> When you don't get the tax dollars that you need for the infrastructure for roads, roads and bridges are deteriorating, finally somebody woke up and said, "Wait a minute. Look how much money is going to North Texas. Look how much money is going to East Texas. Look how much money is going to Central Texas." Even West Texas that has less population is getting more money than we do. We started speaking out. Likewise with education, look at our facilities. We're growing and

> our classes are thirty-four, thirty-five students to a class while other schools have twenty-two, twenty-four students to a class. You know, when it rains, it leaks inside the buildings. We don't have enough instructional materials for our students. We don't even have overhead projectors and technology. I mean there are many new instructional innovations that we cannot purchase because we don't have the means.

However, Mr. Lira was hesitant to ascribe direct blame for the neglect on educational legislative issues to TASA. He stated, "You know TASA sometimes has made decisions on what they think is good for all districts but it's very hard to do. That is very, very hard to do." Mr. Lira admits that the past legislative session was difficult for many statewide organizations and points to the formation of STAS as a positive development in the acquiring of more political clout and regional voice. He continues by saying:

> The reason why the South Texas Association was developed was that we felt that thirty-nine school districts together would have more clout than one or two being political activists. We all came together and formed this as a political lobbying group. We wanted to be heard. Before you would go to Austin and it was, "Oh, it's just one or two school districts. Forget it." You know, they wouldn't give you the time of day. Now you are coming here with thirty-nine school districts and you have a population of million people, "Well, wait a minute. We better listen to them." And we have had an impact in the legislature because of that. Recently, Region Two…and Dr. Treviño was part of this Association when he went to that region and he started formulating Region Two to join the South Texas Association. We were trying to expand to other regions but at the same time we

have to walk before we can run. We were inviting other school districts that had similar demographics to join.

Dr. Joe Treviño was equally hesitant to implicate TASA as a major factor in forming the organization. As does Mr. Lira, Dr. Treviño realizes that statewide organizations have vast constituencies and multiple legislative issues that must be dealt with and stresses the need to cooperate and collaborate with other organizations as the best possible scenario within the macropolitical context. Unity, as he sees it, is essential in accomplishing STAS goals and remaining relevant in statewide politics.

Interviewer: How much of an issue is the fact that other organizations like TASA weren't really listening to the concerns from the Valley?

Dr. Treviño: I don't think (long pause). I don't think it's that they weren't listening and ah (pause). And maybe that was it, but I think organizations, I think organizations like TASA and TASB, they represent everybody. And so it's harder to come to a consensus and the three or four things we want to focus on. Hence, the need for us to organize and develop our own association. Hence, the caution we have in expanding it. Because we do want to keep the focus on school finance and the needs of the Valley school districts with high, low-SES populations, high minority populations, mostly Hispanic in what we focus on. Now, I think as it relates to South Texas, recently, over the last six months, TASA has become very involved with us. And they are keeping their ear to what South Texas needs are. But really, I think it is also a matter of all of us needing to come together because just in the last year I sense a greater unity among all associations because we have a fight on our hands as it relates to school finance, as it relates what's going to

> happen to the restructuring of taxes and as it relates to what we feel needs to happen and the legislative level to continue to support education. So we're all saying the same kinds of things. You know, I think when you look our legislative agenda that we are working on it's going to be similar to Texas Association of School Administrations, to the TBEC[29] (Texas Business and Education Coalition) position paper, to Texas School Alliance, I mean all of us are really coming together and saying the same kinds of things.

"Maybe those brown boys have something"

While the participants had varied response as to the responsiveness of TASA and other statewide educational organizations, they all agreed upon the central importance of being politically active and organizing for political clout. In much the same way, all the participants cited coalition building as essential to accomplishing its goals. Specifically, noting the Republican nature of the legislature the superintendents stated that forging relationships with poor, rural districts in West and East Texas would prove beneficial to their cause. Although the majority-white school districts were represented by Republicans, members of the STAS realized that educating school leaders and legislative staff about the ramifications of Representative Grusendorf's legislation would be detrimental to their economic health. As Richard Muñoz stated, the legislative session was divisive and "terrible on relationships." As he stated, districts that would be negatively affected felt they needed to support the legislation "not necessarily because

[29] The Texas Business and Education Coalition was formed in 1989 to "bring business and education leaders together in a long-term effort to improve the performance of the Texas public school system." Its board of directors consists of business, educational and community leaders.

they believed in it but because they felt they needed to be on the inside (of the policymaking process) and they could do more good being on the inside."

Mr. Muñoz and others in the STAS leadership decided that the "only way we can fight this is to fight, if that means you're on the outside looking in that's fine, but you gotta let them know that on that you are not going to compromise (on equity)." The organization sent their members to testify, lobbied representatives that had poor, rural districts and were eventually successful in helping to defeat the legislation. Mr. Muñoz was frank in his admission that the defeat would not have been possible without the cooperation and willingness of the Republican-lead districts. He stated:

> We were successful. But only because the Republicans in West Texas helped us, you know. Poor districts, but they were Republican. If it hadn't been for them, those bills would have passed. But because they decided that they were going to suffer also, then they talked to their legislators. So together with our legislators and theirs, we were able to stem the tide.

José Ybarra reiterated the notion that the primary factor keeping the bill from being passed was Republican support of their constituency and the adverse effect to rural, white-majority school districts. Mr. Ybarra further contextualized the political climate by laying out the Republican platform, alluding to their ignorance of school finance policy.

> **Mr. Ybarra:** The other thing that happened in this legislative session is the Republicans, they had this platform, "we're going to get rid of "Robin Hood"" without really understanding what that meant. You know, when you go over there and destroy a system that you're gonna change it…when you have $2 billion that you're no longer going to have that revenue that's coming to the state, well where

is the money gonna come from? You know, what really helped us in our Association is beginning to make contacts with Republicans, with the superintendents of Republicans in the smaller schools and to begin to show them, "this is how it's going to affect your district." And then, they (Republican legislators) started getting those calls (from their school districts) and then that's why they started, I mean, flat out, flat out, Grussendorf told us that he had the support of the powers-to-be to pass his bill, the original one.

Interviewer: So you were able to form coalitions or start talking with some districts that don't have as many Mexicanos but they had the economics background that you guys have, so you were able to form coalitions?

Mr. Ybarra: That's right.

I asked Andres Rios about coalition building with poor, predominantly white school districts. While he affirmed what the other participants were saying, Mr. Rios was emphatic about inserting race into the equation. The political dynamic of race not only operated under the guise of economic differences and class-based issues, it also included elements of race that the STAS could utilize to benefit their position.

Interviewer: Do you think the Association can work with poor, predominantly white districts? Because there are a lot of districts in East and West Texas that are very poor but are Republican?

Mr. Rios: Who all of sudden smell the coffee, who were on the Republican bandwagon, but I guarantee you that it wasn't until those guys woke up that they realized, "Wait a minute, maybe those brown boys have something." Because

their numbers were going to be affected like ours. *En eso comensaron a* [With that they started to] react.

Interviewer: It wasn't until they saw that it was going to affect them?

Mr. Rios: Yeah. And that's a level of frustration that I've encountered a lot and that is, and I would say in a meeting, "Wait a minute, Mr. Alemán needs to be in here because of…" And they would go on. "Well, Mr. Alemán needs to be here." And then they would go on because most of the time I was the only *mosca* [fly] in *leche* [milk], or the mosca [fly] in *chocoláte* [chocolate] because the blacks had more representation than we did. *Y les tienen mas miedo a ellos*. [And they had more fear of them.] And then a white guy would say, "Well, maybe we ought to bring Mr. Alemán in here." And they would say, "Yeah, let's get Mr. Alemán." And I go, "Wait a minute, I just said that four times. How come when he said it, it was okay." I'm telling you all that happens today. It happens today still.

Mr. Rios understands the white majority leaders will refuse to validate his concerns no matter how many times he brings issues to their attention. Rather, they are only convinced of "need" when it begins to affect them personally. He gets frustrated by this but understands the need to use their interests to foster his interests in the same way that the STAS attempts to increase their influence by aligning their interests with those of poor, majority-white school districts.

The STAS membership shows no signes of disillusionment because of the illegitimacy ascribed to them by the current legislative leadership. They characterize the macropolitical context in which they must operate as a fact of life. I conclude this line of questioning by asking whether this type of political maneuvering will be necessary in the

future. Mr. Muñoz best summarizes how STAS must form coalitions in order to remain relevant.

> **Mr. Muñoz:** We know we're going to have to do that. In fact, we just talked about it in a meeting. We know. We are going to have to establish coalitions with the West Texas school districts. We know that. If we're going to be, if we're going to try to impact rather than react, we're going to have to form coalitions with other areas of the state that might be represented by Republicans but who are poor.
>
> **Interviewer:** And who will be affected just as much as you guys?
>
> **Mr. Muñoz:** Uh-huh, just as much as we would. We know that. If we want to continue to be effective we can't just isolate ourselves, we know that. So, we just talked about it in a meeting, we're going to have to establish those (relationships). They have the numbers…They don't care, so if we can get, see that's where the Republicans in East Texas and West Texas come into play…Because they have, we found out, their small, rural, poor districts, but represented by Republicans, they're just as concerned about school finance. They have the same concerns we do. We have found that. So, we're going to have to work with those associations. And together, then we've got enough votes in the legislature to influence the outcome. We have enough votes to influence the votes. By ourselves, we don't. But, if we establish these alliances, which I'm going to have to start working on, between now and that special session, because we share the same interests, we're going to be able to influence, to a certain degree, I think.

Although the micropolitical perspective is first used to characterize issues of conflict, power and interests, the study participants each have strong beliefs of the need to be active in statewide or macropolitical organizations. They formed the South Texas Association of Schools so that the "voice" of Valley school districts would not go unheard and soon realized that organization alone would not legitimize their concerns. Instead, utilizing interest convergence principles allowed them to protect and preserve the state funding system they fought hard to reform. As I concluded my initial conversations with the participants, race and racism themes continued to emerge. They each were raised in segregated and unequal environments had endured racism in their upbringings, sought ways to become politically involved and formed an organization made up of districts with "similar demographics." The next section describes findings that relate to themes regarding race and racism in education, politics and the school finance system.

Endorsing Individual-Level Racism

After speaking with the participants about the formation of the South Texas Association of Schools, I came away with the impression that there was still a significant amount of frustration at the lack of attention paid to and respect showed towards districts in Regions One and Two. Repeatedly, a race or racism theme surfaced. For example, several study participants described how the TASA-STAS relationship improved only after they aggressively protested TASA support of legislation meant to eliminate the current equalized funding system. Richard Muñoz shares an example of the tension but immediately describes the lack of diversity in TASA leadership. He explains:

> I quit. I was their field service representative down here in Region One and Two and I said, "I cannot work for an organization that will support that." And I was

their first Hispanic to work at that level …they still don't have any Hispanics, TASA doesn't, TASB, I don't know where Elizalde (TASA staff member) is now. Chris Elizalde is on their hierarchy. That would be the only one (Hispanic) that they have, if they have, they don't have any other. And so, we're very concerned that they don't represent the makeup of the kids of the state of Texas and they seemed to be not moving in that direction. So, hopefully the next step we're going to have is TASA will have, next vacancy they have, maybe they will, they're afraid right now I'm telling, I mean they're shaking, and I have a feeling that the next major vacancy they have they're going to hire a Hispanic. They are going to do their best to hire a Hispanic because they know now that we're not going to sit idly by and not say anything.[30]

Henry Tamez also describes an instance in which he attended a TASA meeting as the only Latino or Mexican American representative and mentions attending the annual Mid-Winter Administrators conference in Austin, noticing how Mexican Americans are disproportionately represented in leadership positions.

Mr. Tamez: *Vete pa el* [Go to the] Mid-Winter conference *un año* [one year] and look at the general session. It gives you an idea of where the Hispanics do fall. You've been there, *verdad* [right]?

Interviewer: Yes.

Mr. Tamez: *Súbate patras pal auditorium pa alla pa arriba* [Go to the balcony area of the auditorium] and look at all the (lack of diversity), *n'hombre, entonces* [no way man, then], then you know where you stand. I know when I said my little

[30] TASA has recently hired a female, Mexican American administrator as their Associate Director for Curriculum.

> speech about the TASA (support of school finance legislation detrimental to the Valley), shit I was one among forty *bolios* [white people]. I was the only Mexicano. They thought I was crazy. All the way home, when I drove, I felt like shit. *Me dije* [I said to myself], "*Chinga* [Shit], I made an ass of myself." You know? *Este, pero n'hombre* [Ah, but no man], you gotta do it. You gotta do it. Later one my colleagues (said), "No, we heard about your little dog and pony show *alla* [over there at the TASA meeting]. *Te a ventates*. [You outdid yourself.]" "*Muchas gracias*.[Thanks a lot.]" And all I said, "Hey TASA, why didn't we join efforts with the Equity Center when we represent sixty to seventy percent of the kids in low-wealth schools…*La politica en el estado Enrique es* [The political process or decision-making process in the state is a] bigger animal out there. *No creas que* [Don't think that] it's you and me *aquí* [here] having this conversation.

Both Mr. Muñoz and Mr. Tamez describe an institutional and systematic racism that pervades the Texas school administration and political process. This perspective was not exhibited consistently or by all participants. Throughout the interviews with all the participants, issues of race, inequity and unfairness continued to appear during our discussions of their personal background, philosophy of education and concepts of politics in education. I therefore wanted to expand on their perspectives by asking direct questions about the existence of race and racism in education and educational policymaking.

<u>"We still have some racist people – on both sides"</u>

Most notably, the superintendents understand racism in terms of the racial acts of both individuals and groups. Although they had each been raised and schooled in what some would term a racist, unequal economic and educational system, six of the eight participants initially described racism as a sickness that can be "cured" rather than a systemic social ill affecting society's institutions, systems and beliefs. As I began my first interview with Dr. Joe Treviño I sensed an excitement to talk about school finance policy issues. Dr. Treviño completed his school finance dissertation in the late 1980s, a time ripe with legislative and court action. I explained to him that our second interview would include more specific questions regarding the funding system and that our first meeting would include a conversation on race. As I asked my first question on the topic, he hesitated and became more reserved in his responses. He responded to the first question by assigning "blame" to both the white majority and people of color, but clearly focused on the role that Mexican Americans played in fostering his view of racism.

> **Interviewer:** Some people say that there is racism throughout the educational system, do you see that as a leader here or have you seen it in your other jobs?
>
> **Dr. Treviño:** I don't think there is any question that we still have some racist people – on both sides. I see it on both sides. So yes, I think there is some racism. I don't think though that needs to be an excuse or a battle cry for me or that it should be a battle cry for us (STAS).
>
> **Interviewer:** You mention not using it as a battle cry. Do you think that using any kind of racial discourse in the political arena is a bad idea? (pause, waiting for an answer, I decide to probe with additional questions) Would it turn people off? Instead of building coalitions, looking to work with people, would it hurt the

cause? As we head into a special session and historically, Mexican American populations have been disadvantaged by school finance systems. And it wasn't until 1995 that we got the last *Edgewood* court case, it wasn't until then that…

Dr. Treviño: No, I think it is appropriate, when there is an injustice that is evident, that it needs to be brought out. I'm not, how should I put it, I'm not naïve enough to think that, yes there are situations where that needs to be pointed out to people. Now, I don't, from a finance standpoint, I think we are beyond that. We are beyond that in that generally-speaking we have a fairly equitable system…Now, we can't let our guard down, but I think when there is an injustice and it seems to be racial and/or geographical that we must point that out to people – working within the system. I don't think that, I think we do get to a point where you get aggressive about it and you file a lawsuit. You file a lawsuit at times when it becomes necessary.

Curiously, Dr. Treviño continues to evaluate the question from an individual perspective but turns to a critique of the Mexican American community. He expands on his belief that racism comes from "both sides" by describing how some Mexican American administrators have had no employment experiences in racially diverse environments. The individual action is described as a way to convey the dual nature of racism and intolerance. He states:

> Now, you've got to then as an individual say, "Hey, I know I'm going to work in a diverse situation. I'm going to work in a school district that has black students, black employees. I'm going to work in a situation that has Anglo students, Anglo employees. And I may have a lot of Asians in my district. As a matter fact, I may

have all the religions of the world. And yes, I'm that kind of person that's going to work with everybody." I think a lot of times that makes us uncomfortable, particularly if indeed we've only worked with a Hispanic community. So, I think the opportunities are there. I think we need to look at ourselves and say, "Hey, are we comfortable. Is it our issue? Am I the one who is having the problem in working with a diverse school district or a diverse community?" I think in some instances that is the situation…I don't think that should be an obstacle and yes, I think there are opportunities for Hispanics, they just need to be comfortable enough to go and work with that situation.

Hector Sobrevilla also understands racism as an individual-level action, not an institutionalized set of beliefs or structures. In our conversation we talked about the state of his school district and benefits it receives from the current funding system. I ask him if he ever feels that the proposed Republican changes are a way to further subjugate the poor, Mexican American students that attend his schools.

Interviewer: A lot of the border communities where Mexicano students are will be affected by a change to "Robin Hood" (the school finance system). The debate now is to create another system. Do you think there is racial politics involved?

Mr. Sobrevilla: To some degree, Enrique, I guess I was brought up, I mean, yeah my dad went through racism and all that but I was brought up in an environment where prejudice is not, was not something we hung our hats on. It was ingrained in us to not be prejudiced; it was like, the golden rule type. And I know if you say, I mean we weren't blind to it, I mean I went through it to a certain degree, not like my dad did.

Interviewer: You learned how to deal with it?

Mr. Sobrevilla: Yeah, and I guess, maybe Enrique, it's the way that I feel about myself. I mean, I feel just as equal as anybody else so it doesn't bother me whether you are white or black. I mean, that's the way my mentality is, maybe its wrong. I'm not blind to it, I understand it exists. And if it happens to me directly, I can defend myself because I have an education equal to anybody else, and more. And I guess, this is why when I do things, I do it for our kids because I lot of our kids, our recent immigrants, if we don't do that for our kids, if we don't fight for the "Robin Hood" concept and we don't do what we are doing, what happens to our generations coming behind us? What's going to happen to our kids?

Interviewer: Do you think it's a good idea to bring that (racial discourse) up?

Mr. Sobrevilla: Well, it wakes you up. Is it racism? To me, again, based on my reality, it is racism but its camouflaged maybe. I don't know, I don't know what goes in men's minds. It could be camouflaged.

Mr. Sobrevilla understands racism as an individual act but chooses not to feel like a lesser person by those who have a racist ideology in their "mind." He denies a need to have a racial discourse because as he learned as a child that was not the way to lead his life. Mr. Sobrevilla supports the concept that people should treat others the way they would like to be treated and uses the example of his father who withstood "real" racism as a way to explain his ability to overcome individual acts of racism.

There appears to be a real need to be critical of Mexican Americans by several of the participants. Dr. Treviño spoke of the need to have administrators willing to work and be exposed to diverse communities. Similarly, José Ybarra's first response when asked

about racism in education was to characterize the issue on an individual-level in which the acts of some "rednecks" could not be used to argue for change – doing so would "turn people off." Instead, he shares an experience in which he and several other STAS members testified on behalf of a bill that would require testing of immigrant students. The Intercultural Development Research Association (IDRA)[31] testified on behalf of the bill that would make it more difficult for districts to ignore this student population. Mr. Ybarra viewed this as an attack on his region and his district. Nevertheless, rather than having a discussion on racism in education he utilizes an example of policy differences to point out that he and districts in the Valley do not single out different people in their schooling practices.

> **Interviewer:** Do you think it is beneficial to bring up race and racism in our discussion of school finance policy?
>
> **Mr. Ybarra:** I think Enrique, *que* [that], we never ought to forget about, you know, us Mexicanos and our struggles and what we need to do. But, I think that if you put that up front, you are going to have a lot of people who just turn off. A good example is IDRA there is a lot of people that are upset with IDRA because of the stance they take…And we went over there (to testify in the legislature), and IDRA, when the representative from IDRA came to testify and saying we needed to keep that law and we needed to do that, and we were saying, "Wait a minute. You know, go to any other country and go take a test and see if you do as well as the others." In one year, *mano* [brother]? No, you need, and then that's when they

[31] IDRA is a non-profit research organization based in San Antonio, Texas. One of its founders was Dr. José Cardenas, one of the original leaders of the *Edgewood* plaintiffs, the group that fought for equity in school finance policy. They conduct research on legislative issues such as school finance, bilingual education, high-stakes testing and drop-outs.

began to give some flexibility, that as long as they were schooled in the United States at least three years then, then we needed to test them. And we can understand that. Because I can also personally can relate to when they test me in Harlingen when I was there first. I'm afraid to go see the records because they might think I was borderline special ed. (Laughter) Because I didn't understand the language, you know, they gave me a standardized test, *pos que sabes* [well what do a person know at that point]? You know, *nada* [nothing]. And so, so, so it's…And for us to be able to put a whole weight in one to someone that's been in this country for less than three years. And like we testified, and this lady, representing IDRA, was adamant that no, that the only thing we do, that's when we said, "Hey, wait a minute guys. If Houston is doing that, and if Dallas is doing that, then you need to target that, then you need to target that. But don't make a blanket statement if you have 38 superintendents in Region One anyway, that are going to take an issue with that."

Interviewer: That are going to take a hit?

Mr. Ybarra: Because ***we*** (emphasis), we educate Mexicanos, in the valley 96%. You know, so, to us that's not an issue, and I don't think there is not a district in here that does things for whites, you know. We do things for kids, regardless what their color is.

My questioning on issues of race and racism were framed in a way to illicit a response on the racist nature of policy and the statewide funding system. I was attempting to bridge the discussion between historical inequity in their region and the funding mechanism instituted by legislators. Manuel Lira, as did the previous participants, also

characterized discrimination and prejudices as individual actions performed by certain racists. As I did with others, I asked Mr. Lira if he thought instigating a discussion of racism and race in the policy debate would be beneficial to STAS and districts in the Valley.

Interviewer: Do you feel that there is racism or people should talk about racism in schools as far as policies and politics? Maybe the policies are racist? Maybe the way the funding system is set up is racist? Is it helpful to talk about that or think about it in those terms?

Mr. Lira: Let me give you a couple of examples and hopefully I can answer that question. And I hope that uh, and this is private, so I can say this. I was talking to a neighboring superintendent. They are going out for a bond issue for $90 million. She was having a difficult time selling the bond issue. There was a lot of people for it but then there was a lot people against it or didn't want to commit one way or the other. So she was talking to different civic organizations, like the Kiwanis, the Lion's Club, etc., etc.(civic groups made up of predominantly white citizens), and one of the questions that was asked was, "Well, what happens if this bond issue doesn't pass?" She says, "Well, the only room that we have facilities to put more students in is on the south side (a predominantly Mexican American, less affluent neighborhood). Thigpen Elementary, Lamar Elementary." She named four schools. Well, these are run down schools on the south side. And the reaction, "Oh no, you can't do that. I don't want my grandchild or my child to go to the south side." Because these are run down schools. These are old schools. She said that she had to use that strategy to change the mindset of the people.

> They didn't want to remodel these schools or build new elementary schools, but when it made a direct impact on where their child was going to be, oh, that made the biggest change in the world. So that's one example.

When this voting-bloc, comprised of older, white citizens, was informed that their children and grandchildren would be forced to attend schools that were integrated, their minds were more easily swayed. Mr. Lira used this example to portray negative individual attitudes to the Mexican American student population. He immediately followed up this story with an example of a positive occurrence in which a district from North Texas sought out his assistance in addressing the needs of Mexican American students attending their district. Mr. Lira attempts to convey that not all white individuals are racist and that relationships are improving for the better. A discussion on racism would not accomplish this advancement. It would only focus on the "bad" individual racists rather than the positive experiences that stemmed from cooperation. He stated:

> I'm going to give you an example of positive one (example). I had a call from the superintendent from a district in North Texas, way out there in Dallas. He says, "Mr. Lira," *este* [ah], "we're looking on the internet and we see that you have very, very good scores and you have a predominantly Hispanic population and that you are doing very well. In the last ten years, our district has a new factory, it's Pilgrim Farms. They raise chickens, poultry business. They process them. In the past ten years, we've had a lot of Hispanics come and migrate here, live here, and now they are permanent residents. They are coming to our schools. We don't know how to educate them. We are doing a very poor job of educating them. We'd like to send a team of some of our administrators and some of our teachers

to your school district to see what you are doing and why you are so successful." So he sent about ten people. I said, "Sure, come on over." It was an eye-opener for them - culture shock. One of the first things we did to kind of break the ice – they came in about noon, they had a long drive – we met with them and gave them an orientation and then we took them to Mexico, to Progresso (a border town), to eat – so they could see Mexico, to go out to eat, the music, the festivities. They really enjoyed that, broke the ice. Because they came in, very reserved, all they saw was Hispanics and they are predominantly Anglo. And so, they weren't asking very many questions or anything throughout the orientation. They were just like, in shock. In the evening, when we took them out there and they started having a good time, eating, food and social hour, we started talking, all of a sudden they kind of opened up. They were here for two more days, they were actually here for two and a half days and then they had to leave. They didn't want to leave. They took all the strategies and the materials. I commend them for doing something like that. How many school districts are just like this district and they are not willing to go out and learn from other school district who have in how you educate and how you deal and how you work with? As a matter fact, they came back and did a follow-up and sometimes we communicate on-line. There is a lot of diversity in schools and those schools that can best meet the challenges and are best willing to learn not needing to re-invent the wheel, because that takes a long time, but if you can go out to other schools that are successful with that type of student, ethnicity, you are way ahead of the game, you are way ahead of the game. And I think this is positive. And I think more

> sharing and learning needs to take place. There is nothing better than show-and-tell because you can talk to people. But it doesn't really click until you actually see it happen. And we took them into the classroom with the children. They observed the teachers. They observed the activities. They were taking notes.

Most of the superintendents believe that racism is an individual-level act or a person who acts out his or her racist beliefs. Mr. Lira's response to whether race and racism exists is typical of the majority of the participants. While some individuals choose to act out their racist beliefs, many choose to be positive and attempt to acquire the knowledge and skills necessary to succeed with all kids, regardless of color. Dr. Treviño and Mr. Ybarra are similar in their hesitance to rely on a racial discourse to argue their positions. Rather, they turn to the Mexican American community in their explanation of racist tendencies. Finally, Mr. Sobrevilla believes strongly that while his dad endured racism, he is more prepared to deal with racist individuals because he has been educated and is fit to defend himself. The participants further explain inequity in education and funding by turning to an economic explanation of inequity.

"Its not racism…it has to do with money, power"

After introducing a discussion of race and racism in education, I attempted to merge the issues previously discussed – the need to form the STAS, inequity still in the funding system and the importance of their becoming active at the statewide level. I continued to press them to explain why the current state of school finance disadvantaged them and what would be the best way to approach the political debate. Hector Sobrevilla succinctly answered the questions and provided his understanding of the school finance issue.

Mr. Sobrevilla: I think, it has a lot to do with economics. You know like Plano (suburban school district in North Texas, is one of the wealthiest school districts in the state) and those people, they have a lot of businesses. They don't have the homeowners because business picks up the slack. We don't have any slack here. Like in my district, it's a bedroom community, people come and sleep here and they go and work outside. We don't have a lot of industry. The school district is the biggest business that we have. We are the employment agency. And I know that it is the politics of, our budget is $150 million. I have over 2000 employees, over 11,400 kids.

Interviewer: So you think it's more of an economics issue?

Mr. Sobrevilla: It's an economics issue.

Intrigued by his understanding of the issue not as racism but economics I probed him for an explanation of the racial hierarchy in the economic structure. Mr. Sobrevilla used the example that school districts are economic machines that generate jobs, purchase computer technology, provide health insurance, and operate transportation systems. In essence, he was attempting to divert discussion of race toward an argument for more money for school districts. He refused to accept the concept that the school finance and regional economic inequities were interrelated. Finally, he returned to his individual-level perspective in which his personal accomplishments, knowledge and skills become protection against individual, racist actions of persons. He explains:

> But to me for certain, let's say it's not racism, but it has to do with money, power, that's what drives everything. It's a capitalist society, money drives everything. Look around you, who has, whoever controls the economy, controls the power. In

the Valley, look at me as the superintendent, how many Hispanic superintendents do we have in the Valley? So who controls the economy in the Valley? So, it's not so much that white, it's the ones that have the most money are the one's that control everything. They control, they have the power…So I don't know if racism is camouflaged, people don't like it. I feel uncomfortable with it. You are probably aware of it, but I'm not going to hide myself or deny that it exists. It does exist to some degree. I see it. *Este* [Ah], again, I don't except it and when I'm in a room full of Anglos I don't see myself being less than them so that's probably why I don't agree with it. I've proved myself. I'm equal to them and I can speak their language plus I can speak Spanish. So to me, I guess my comfort setting is fine. I think we're equal.

I attempt to insert a more complex understanding of race, funding and politics by sharing an example of my work experience with José Ybarra. In general, I hear comments from North, West and East Texas school district administrators regarding the fact that a majority of school facilities funding is awarded to districts in South Texas.[32] I asked Mr. Ybarra whether the fact that the Valley region has a majority-Mexican American population had anything to do with the comments of this random selection of white administrators.

Interviewer: I get a lot of comments about the fact that a majority of the IFA money is going to the Valley and I always wonder how much of that is racial

[32] The Instructional Facilities Allotment (IFA) program is the state's funding program that assists districts in the payment of bonded debt. Districts must apply to the program and are awarded by wealth. The poorest districts as measured by property value and average daily attendance (ADA) are ranked at the top of the list. Because the legislature has in the past not funded the program adequately, the funding has been depleted without funding all those that apply for it. Districts in the Valley and in South Texas in general have been awarded due to their very low property wealth per ADA.

(politics)? How much are they really trying to say, well, the Mexicanos are getting all the money?

Mr. Ybarra: Well, I'm sure a lot of it is. When you can't (make it) racial, then you make it economics. And one compliments the other, unfortunately. And so, yeah, basically, and in private I'm sure they'll say, "Ah, we're giving those Mexicans too much money already. They don't need that much money." The neat thing that the (standardized testing) scores and the reason they have been increasing and doing better or else they would bombard us with that. Ah, but there's, I'm sure there is a lot of that.

Mr. Ybarra understands the issue as economics issue also, although he concedes as did Mr. Sobrevilla that he cannot get into the "minds" of racist individuals. He mentions that in private this is probably occurring but the fact that districts are increasing their standardized testing scores has abated some of the criticism. I attempt to discern whether Mr. Ybarra has a broader understanding of racism in the school finance context. I ask if establishing a more honest discussion of race and racism would benefit the STAS. He is not convinced that introducing it would benefit the STAS' standing in the political arena referring as others did for a need to form coalitions with poor, predominantly white school districts and administrators.

Mr. Ybarra: See, because one of the things, in my lifetime, one of the things that I have seen is that we (the Mexican American community and STAS in particular) have gotten a lot of further if we don't make up front the Mexicano issue, more than the economic issue. We said, "Hey, why is it that the kids living in the Valley will not have the same privileges that the ones in North Texas, they're in

the same state?" And the constitution says that it is the responsibility for the state to provide this. And so why should we have thousands of dollars less than the students over there?

Interviewer: So, you think you should put the Mexicano issue up front more? Is that what you're saying?

Mr. Ybarra: No, no, I'm thinking economics ought to be first, more than anything else. Because you're going to have some redneck that once you mention that they're going to block you.

Interviewer: Right off the bat?

Mr. Ybarra: Yeah, right off the bat. And then when that happens, then you don't have an opportunity to discuss the critical issue and that is the economics of it. And that's why when we begin to look at this and we begin to look at East Texas and West Texas and talk to those superintendents that their representatives or senators are Republicans, we begin to say, "Well, we've done a little (school finance) model here. And this is what it looks like. It's going to impact our district and your district." I mean, "Are you willing to lose that kind of money?" And then, they started to get the costs, and I think that's where everything started to change, you know.

Mr. Ybarra does not equate the unfairness of the "economic issue" with the plight of many Mexican American communities. He refers to the depressed state of poor, predominately-white school districts as way to capitalize politically. Richard Muñoz similarly does not consider the school finance issue as one that signifies the racist nature of politics and funding in the state. He mentions another statewide organization, the

Equity Center, as one that looks out for all poor school districts rather than only those with a majority population of students of color. As I did with Mr. Ybarra, I ask Mr. Muñoz whether the discontent associated with facilities money being awarded to South Texas school districts has a racist connotation.

> **Interviewer:** Is racism involved here (with the politics of school finance issues)? Is there any kind of racial component to that at all?
>
> **Mr. Muñoz:** I don't think so. And the reason I'm telling you this is because there is an organization, I know you've heard of it, called the Equity Center, that's made up of districts statewide, of poor districts, property-poor districts statewide, and most of those are, because most of the districts are outside the Valley, they are predominantly Anglo. And we are able to work together. So, no I don't think it's a racial thing as much, no, because I know with the Equity Center we're able to work very well together. The Equity Center, we work very closely with, except the Equity Center has, which they should, a no compromise position. They want the perfect world. And they don't budge from that. And we are glad that somebody has to be there setting the target that you may never hit and probably will never hit. We'll never have the perfect world where our kids get as much dollars as the kids in Highland Park. We'll never reach that, that's an unrealistic goal to have okay? But you need to have it.

Mr. Muñoz refers to a concept known as full equity in which every district will receive equitable amounts per weighted student. He does not believe that the system is unfairly disadvantaging schools in the Valley because the Equity Center, which represents many poor schools around the state, is fighting against the elimination of equalized funding and

working with the STAS. Mr. Muñoz is again alluding to the discomfort and damage to coalition-building that would be generated by a discussion on race and racism.

Henry Tamez was able to effectively communicate his dissatisfaction and the unfairness associated with the school finance system. Even though he has a history of fighting – individually and as a part of the STAS – for increased funding and believes that the state of Valley school districts has improved, Mr. Tamez is still cognizant that Valley school districts are still well behind other more affluent school districts. I asked him also if the fact that facilities funding was mostly being awarded to Valley school districts should upset districts in other regions of the state. Furthermore, I asked whether the creation and funding of the Existing Debt Allotment[33] (EDA) was meant to funnel money to richer, predominantly-white school districts, away from the districts in South Texas.

> **Interviewer:** And so what I hear at the state level, people from the Dallas area, West and East Texas, say, "Well, why are the Valley districts getting on all the IFA money? It's not fair, it's not fair at all." And in the last session, they (the Legislature) passed EDA, not IFA. The EDA is for those who can afford to issue bonds on their own anyway. They can wait one or two years and then they'll get the money automatically. With the IFA, districts who can't afford to do it on their own, they have to wait for that money. And so my question to you is, is there any

[33] The Existing Debt Allotment (EDA) was created in 1999 by the Texas Legislature to assist school district with their repayment of voter-approved bonds or debt. The state funds "existing" debt as of August 31, 2003 based on the wealth of a district. The "poorer" (based on property value and ADA) the district is the more state money is provided. While the IFA program is also meant to help districts with the repayment of bonds, this program does not require an application and is not relegated to debt for the sole purpose of facilities. Districts may be funded for any legal purpose. In the past legislative session, the Legislature funded more money for EDA rather than IFA. The result being that districts who cannot afford to issue debt on their own will not benefit.

type of racial politics involved with the decision to fund EDA (which would benefit rich school districts) rather than IFA (which Valley school districts have benefited from disproportionately)?

Mr. Tamez: What the Dallas' and the Houston's and the San Antonio's and the Austin's, what they get is the big state money – Toyota, they get the Dell's. And you know that the state politics influences these big companies. The schools get that money indirectly, but you know, the infrastructure as far the highways and the interstates, *estan allá* [they are over there]. And whether the schools know it or not, they're benefiting from all that. You know, there is no interstate coming to South Texas. There is nothing. We've been ignored for years. That is the global state politics of who's getting the money. The schools up there get the money indirectly. We're getting IFA stuff. That's peanuts compared to the larger picture that these people get, the stuff that influences their schools for decades. *Aquí, es una baba hombre* [Here, man it's nothing (literally meaning drool) compared to what they get]! But honestly, look at Toyota going into San Antonio. That area will benefit from that, and what was it? It was politics. It was the major players. Who's getting the big stuff? I think that's important. People don't see that. *Los pobres, nos estan dando IFA* [The poor ones, they're giving us IFA money]. *Es una baba, hombre* [Man, it's nothing].

Although Mr. Tamez has a clear sense of the racial politics involved, he explains the inequity in terms of economics and attributes the unfairness to some regions of the state to corporate property values. His sarcastic remark equating IFA funding to a drool points

to the frustration he feels in working for needed funding and then having to settle for what little the state gives them.

"I don't make that public…I'm not a rable-rouser"

In an effort to provoke subsequent discussion of race and politics I asked several participants on the lack of Mexican American superintendents in the field. Of the administrators that had been hired, I pointed out that many of them are in South Texas. Throughout I was told that the conditions and status of Mexican American representation in educational administration were improving and that with increased political clout and participation in all areas of administration and leadership, the state of Mexican Americans in leadership positions would follow. Several of the participants mentioned working within the political system as a method of helping the process to progress. Injecting a discussion of race and racism into the discussion would not yield productive conservations and would only stem the tide of change.

Dr. Treviño was one participant who gave particularly interesting comments regarding the state of Mexican American superintendents. He believes that participation on the part of the Mexican American community has been lacking. Those wishing to not leave the Valley have further exacerbated the disproportionate representation of the group. With their opening up to new possibilities and opportunities in other regions of the state, a more representative leadership would follow. I asked him what his impressions were regarding the fact that the majority of superintendents of Mexican American descent were in South Texas and in the Valley in particular.

Interview: Why do we have so many of Mexican American superintendents only down south? We do have more in other places, but why predominantly south?

Dr. Treviño: Like Mike Hinojosa (pointing to one Mexican American superintendent in the Houston region).

Interviewer: Is it a function of people, school boards not wanting to hire Hispanics in North Texas or are we not getting applicants there? Or is it a combination of the two?

Dr. Treviño: I think it's a combination of the two. But, I think it's going to change. And I say going to change, we, you look at who is being named superintendents, yes we have some Anglos, but there is a lot of Hispanics being named too. I was at superintendents' meeting yesterday and I think we had, I don't know, about six different pictures of new superintendents this year, I would say half or a little bit more than half are Hispanics. Now you would expect that here, but down the road you're going to see more and more Hispanics, particularly in the larger districts.

Dr. Treviño believes that the state of Mexican American administrators, students and communities is changing for the better. By becoming part of the system, taking advantage of opportunities and participating in politics and the debate, schooling will improve and leadership will begin to accurately reflect the populace. I ask Dr. Treviño what his impressions are of the "resignation" of Dr. Felipe Alanis, former Commissioner of Education. Some in the STAS advocated a more confrontational and/or aggressive response to his leaving the Texas Education Agency. I asked Dr. Treviño what strategy he favors employing.

Interviewer: With the reorganization of the TEA and the lack of Mexican American leadership on the upper echelons and the fact that Dr. Alanis was

basically told to resign, do you think a more aggressive strategy by STAS is warranted?

Dr. Treviño: (pause)

Interviewer: There are some people that say STAS needs to be more aggressive as to writing a letter to the governor, it that a big problem within the group, is there tension between those who want to be more aggressive as opposed to those who want to work within the system? Is this an issue for the group?

Dr. Treviño: No. (long pause) I think in any organization you are going to have the few people who are very aggressive. But that's good, I don't see that as bad. Generally-speaking I haven't seen South Texas be that kind of organization. I'm not saying that we don't have individuals who are loud-spoken or who are more aggressive. You know, that's healthy, it's kind of you wear the black hat, I'll wear the white hat kind of thing. I think that's healthy and that's good.

Interviewer: I'm hearing two different things, some are saying you should work within the system, then I'm hearing others say that the strategy should be more aggressive. Is there one method that the group should employ?

Dr. Treviño: I think that as you look at history both approaches are successful. It just depends on the situation and what it calls for and maybe it's situational. I'm one who would prefer to work within the system.

Working within the system as Dr. Treviño sees it excludes a discussion of race and racism within education. He shifts the discussion to an introspective examination of Mexican American superintendents and administrators. He states that "one of the things that we need to do though is to be willing to participate, be willing to make the change,

and I'm talking about physical change." Most of the statewide organizational offices are located in Austin. Dr. Treviño states that "if we want a Hispanic to be the head of that organization then we need to have Hispanics who are willing to move to Austin." As he sees it, many times administrators are not willing to move out of their comfort zone. He states that "some of it has to do with culture, some of it has to do with history, some of it has to do with wanting to work in the Valley, and that's fine." Opportunities for Mexican Americans are available but the community has not fully taken advantage of them. As he explains:

> I think we've had some opportunities to get some people hired, let's say by TASA, and so TASA says, "Get me some Hispanic names. Get some people to apply." And we are unsuccessful in getting names for people to apply. Now I'm not talking about Johnny's (executive director of TASA) replacement, but I'm talking about Johnny's assistants. And so I think that is a difficulty for us Hispanic men and women. They're some of us who are willing to move, I mean I'm willing to move. I probably make a few more moves before I retire, but we've got to have more people who are willing to do that. Whether the office is in Houston, Dallas, or San Antonio, Austin, we need to be willing to move. Now, in addition to that of course you also need the number of people who are qualified and I think that is coming. You know, you see more and more Hispanics. You see a shift in the demographics not only with our students but also in leadership positions. And so I think that is changing. We are becoming more of a minority state. So I think gradually yes, you'll see changes in who the executive directors are for some of these organizations and/or some of these state agencies. Now, in

addition to that, you know, we talked a little bit about politics as it relates to the politics of it, there is no question that as you look at who sits in the governor's office that the makeup then of the executive directors or the commissioners, whether that be Texas Department of Health or Transportation, well, they are going to be representative of whoever is in office. And so what does that mean? Well, that means that we, Hispanics, ought to be involved in that politics. And I'm not saying that you have to be Democrat or Republican, I'm saying we ought to be involved. And I don't know that we have been as involved as we need to be in those politics to be able to get those politics. They may not be as representative as they should be, although I think that both parties are cognizant that they need to pay attention to the Hispanic vote. They need to have a representation in their cabinet, in their appointments that are representative of the state as well. I think we are making some progress. I mean, I think all of us were very disappointed with what happened with Felipe, I mean, no question about that. Some of us still talk about that. I think it was a slap in the face to Hispanics. I lay that right at the Governor's footsteps, to say, "Hey Governor, this was you. You did this. You used us. You used Felipe." I've said that to people. I've said to our board members. So I don't, I mean, I don't make that public and go out there, I'm not a rebel rouser about that, that's the way I see that situation.

Dr. Treviño not wanting to be considered a "rable-rouser" is indicative of his "working within the system" approach. Richard Muñoz also challenges Mexican American administrators to become more involved in the political process. He characterizes the "politics for the Mexicanos" as "unbelievably nasty." The primary

issue with the group is that "they fight each other, I'm telling you, the big egos." Mr. Muñoz also speaks of unity and participation as did Dr. Treviño. He boasts of the unity the STAS has despite all the petty "egos" and political animosity present within the Mexican American community. He states:

> But when it comes to education, united, same page. I don't have to worry about that. I have to worry about not getting right in the middle of the (political) crossfire, in their arguments with each other. Oh, they are always arguing with each other. Not education, other petty stuff, politics. And I have to stay out of that, because I've got to be able to, if (Texas State Representative) Kino Flores is arguing with (Texas State Representative) Aaron Pena and right now they are arguing, for example, on crap. I need both of them, see. So I've got to stay out of the way while they have at it with each other. They do, (Texas State Senator) Zafarini *con* [with] (Texas State Senator) Lucio, oh yeah. *N'ombre que tienes* [No way man, what are you talking about], we wouldn't be Mexicanos if we didn't do all that. But when it comes to education, we've got it. And that makes my work a lot easier.

Mr. Muñoz discusses how some in the STAS want to take an aggressive position on the lack of Mexican American leadership in the Texas Education Agency. As he stated, one of the "aggressive" members wants "the Association at its next meeting to consider that there are no Hispanics at the top levels at the TEA. And see, I'm not sure, I want to get us involved in that. So this where I've got to be very careful…" While Mr. Muñoz realizes and promotes aggressive tactics within the group he believes that bringing the aggressive tactics to fruition hurts their cause.

José Ybarra reiterates Mr. Muñoz' position on the discussion of race and racism and believes that "a large percentage of people would be turned off if you do that." He promotes the notion that arguing about "the economics, if you do it on that every child regardless what color they are" deserve the same opportunity. Mr. Ybarra invokes some of his personal friends as examples of the damage that "militancy" would have on the process.

> **Mr. Ybarra:** And see, I, one of the reasons for my thinking, because I have friends that are very militant, well educated, militant, to the degree, *verdad* [right]. And they tell me that because they were born and raised here and they saw a lot more discrimination than I saw when I came here in 1960 as a thirteen-year-old. And maybe, to some degree.
>
> Interviewer: But you had to deal with that too?
>
> **Mr. Ybarra:** Well, yeah, I dealt with it here…
>
> **Interviewer:** So, what do your friends, who you say are more militant want you to do?
>
> **Mr. Ybarra:** Well, part of the thing that I've learned over the years, if you are going to fight an organization from the outside, you're not going to be as effective as you are from the inside. And those of us that are in education and begin to give into that system and work through the system, we've made, we've made some great strides because we started working that way and not building that wall right up front. But be able to look at those situations, that are common to us, and this legislative session is a very good example of working with people from East Texas and West Texas and them seeing exactly what the formulas were going to

do if they simply do away with the ADA and weighted ADA. Yeah, their weighted ADA might not be as high as ours, but its still impacts their budget. And so, when they began to see that they said "hey", they began to talk to their representatives and their senators and say "Hey, look at these figures."

He returns to the need to operate within the system as the most effective strategy. Because he was an immigrant and experienced overt racism, he did not view the context as did his "militant" friends. Mr. Ybarra's perspective, from a person who emigrated to the U.S., worked within the "system" and utilized his work ethic values, does not view a race or racial discourse as beneficial to the STAS political strategy.

Manuel Lira, similar to Dr. Treviño concluded that conditions are changing and improving for the Mexican American community. He also experienced overt racism in his schooling experience, however he looks to the Mexican American community and its voting patterns as culprits in some of the inequity. Regardless, the fact that several prominent state and federal politicians have visited the Valley, the outlook for the region is seen as on the upswing. I asked him directly if he viewed at least part of the problem from a racial perspective.

Interviewer: Another reasons I wanted to come down to the Valley was because the Valley has historically been left out as far as transportation, health care, university system, and K-12, while other regions of the state have gotten more of the share. Some would say that this is racism, others say it has nothing to do with that, how do you respond to that or do you think that racial politics plays a part in this?

Mr. Lira: It is political. Politicians look for votes, look for votes. And unfortunately, and I'm even embarrassed to say this, we have a very large Hispanic population here in the Valley, but how many of them are voters? How many of them are registered citizens that go out and vote? So politicians say yes, Hidalgo county has half a million people but they only have 150,000 registered voters. And so they look at that, so votes takes action. One of the things that we have to do is get more people politically involved, educate them on politics and get them registered to vote. And when the time comes, use this political clout to make a difference. Slowly the Valley has been building up in regards to the numbers of registered voters, number of citizens that vote and its been increasing year by year by year. So now, politicians are taking a look at that, especially statewide politicians. They are taking a look at that nationwide. Recently when Clinton ran for office, he visited the Valley at least of couple of times. Bush was here in the Valley a couple of times. Before then, nobody showed up to the Valley.

Interviewer: You think it has more to do with being more active and the demographics of the state are changing?

Mr. Lira: And more educated, more Hispanics are being educated, more Hispanics are going to vote. So that makes a big difference. It makes a big difference. We now have third generation Hispanics leaving here. The first generation was uneducated, were not politically involved. The second generation became a little more educated and little more politically involved. But now the

> third generation is more educated and more politically involved and they want to make a difference.

Working within the political system equates to denying or negating any form of racial discourse. Most of the participants do not believe that discussion this type of issue is beneficial to the STAS and becomes divisive and not conducive to forming coalitions with other school districts. However, not all of the participants viewed the school finance and the schooling process in the same manner.

"They would rather be lead by Anglos than by us"

Only two of the study participants were outspoken, progressive and direct in their conversations on issues of race – Chuy Gutierrez and Andres Rios. They are considered "outsiders" and those that "push the issue" by key leaders of the South Texas Association of Schools. Two participants mention them by name when I pose questions about racism, then challenge their responses. They appear to suggest that I speak to Mr. Gutierrez and Mr. Rios as a way to diffuse any confrontation and "satisfy" my need to talk about such issues.

Chuy Gutierrez had participated first-hand in the Chicano Rights Movement, was actively involved with La Raza Unida Party and continues to be very proud of his activism. When stating how he had participated in previous dissertation and master's thesis with topics on the Chicano Civil Rights Movement and/or La Raza Unida Party he said:

> And I feel good because I have a lot of people who come and tell me, they've written articles on me, and say, "What you guys did was really something. You guys took the Anglo on and you did it without looking back and you did it without

shame or embarrassment." Hell yes! I felt proud and I still do. I, and I still, some of my coconut friends still say, "Hey, well this guy was involved with the Raza Unida." Like I should be embarrassed because of that. I say, "Hell, I am proud." Discussion of his political participation provides me with an opportunity to ask whether he believes that racism continues to exist. I had already interviewed all seven of the other participants. With six of them I had sensed a hesitance to discuss the issue in up-front manner. Mr. Gutierrez was emphatic in his response. He also describes it as institutional, systematic and not overtly practiced as in late 1960s.

Interviewer: Is there racism in this (school finance) system? Is there racism in education?

Mr. Gutierrez: Of course there is. Of course there is! And, I mean, it is, they try to hide it a little bit more, they don't do it as openly but its there. It's ***always*** (emphasis) been there. And that's my point when I go over there (to TASA executive committee meetings). I had it out with my TASA members, the executive committee, I stood up and I said, "Guys, come on (pounding the table)! Do you believe, do you believe that you guys here are fighting towards an adequate level of education and you're not screwing me? Do you believe that? You're screwing me! And I'm talking for South Texas. And you're doing it, you're trying to do it in a way that some people will not see it, but it's very, very clear." And I told them, I told them and then they changed things. "Okay, we're not going to use this word anymore." I'm outspoken and to me, I guess I'm like you, I tell it like it is.

In speaking with him about the central tenets of La Raza Unida Party, he mentions that "Raza Unida always wanted to get people into positions of power. That's what it is, that's what it's all about." He doesn't speak about this type of activism in the past-tense; rather he considers this to be on-going mission and goal. Although I ask wide-ranging questions, the majority of our conversation returns to issues of race and racism. Mr. Gutierrez is willing to discuss the often contentious topic and returns to this theme on several occasions. In one instance we begin a discussion of the dearth of Mexican American school leaders at the state-level and he uses a story about the former Texas Commissioner of Education. The previous Texas Commissioner of Education, Felipe Alanis, the first Mexican American and first non-white, male to be appointed to lead the Texas Education Agency has recently "resigned" after having served less than a year. I attempted to capture some of his thoughts on this fact and soon learned that Mr. Gutierrez is related to the former Commissioner. The conversation once again is centered on the racism embedded in state level politics:

> We had the first Mexicano TEA commissioner, heh, *primo mío de San Juan* [a cousin of mine from San Juan], Dr. Felipe Alanis, and they pushed that guy around until he said, "*Tan locos* [They're crazy]." I mean he was doing things that were hurting us (Mexican Americans) by force. And he said, "*Primito* [Cousin]," these were his words, "*Primo* [Cousin], I've had enough of this shit!" And so he just threw it away. Because this guy used Felipe Alanis to get reelected, now I'm talking about Governor Perry, used Felipe Alanis to get reelected and really had no plans for him at all. Now we have another Republican attorney heading TEA, who worked on his campaign, who knows, excuse the expression, jack shit about

education and that guy is telling us (Valley school districts) what to do? You think that doesn't hurt? We've got, and I understand the Republicans control, they have the majority and they are there, but don't be so blatant or so obvious in killing us.

Mr. Gutierrez realizes that his role is to push the STAS and his colleagues on issues of race and fairness. Attempting to discern whether he thinks a more aggressive approach to discussing race would assist in arguing and organizing their constituencies, he explains that people like him, while not silenced, are often subjugated to outsider roles.

Interviewer: Do you believe that the Association should be more aggressive or is it doing fine as far as trying to play the game?

Mr. Gutierrez: It's doing okay as an organization but I think that it definitely needs to be more aggressive. We've got key people there doing a hell of a job. People in our leadership…they're working with the system, and that's okay, but I'm a little bit more outspoken than the majority of the people there. And sometimes it's kind of like, "*Pone Gutierrez atracito porque ese allá va y hace.*…[Put Gutierrez at the back because that one over there goes and does…]" You know, my tactics are kind of different but I'm used to speaking up and speaking my piece. Sometimes I don't have tact.

I continue to question him on whether he thinks that Mexican American leaders have become too assimilated into the white-dominated educational establishment and whether they have failed to represent poor, Mexican American communities. He states:

Mr. Gutierrez: Right, and that's not me. And I gather that some of my colleagues are used to doing that.

Interviewer: After all the work the Raza Unida did to get people in positions of power, what kind of people do we now have in those positions? Are they too comfortable with their positions of power? Would a better way be to be more aggressive and being more up front and not negotiating on certain things?

Mr. Gutierrez: Exactly. Not negotiating is a good word because see, even in my younger years involved in politics the negotiators and the people who felt good with the Anglos were my opponents. They would side with the Anglos. But the people that really, really wanted to change things and were not afraid of stepping on people's toes and making changes, those are the people that I had more respect for. You know because a lot of my, and at that time we used the bad word, we called them "coconuts," they were brown outside but white inside. They would rather be governed or they would rather be led by Anglos than by some of us.

Interviewer: Is that still a problem? Are there still coconuts in our leadership?

Mr. Gutierrez: Oh yeah, many of us.

Similar to Mr. Gutierrez, Andres Rios characterizes some of his early educational experiences in terms of institutional racism. He does not need prodding on the subject. In our first conversation I asked Mr. Rios if had always wanted to be an educator. He attempted to answer the question by telling a story of a trip to New York he had recently taken. On the plane, he sat next to a lady who was a pediatric dentist. As a child he had hoped to pursue this profession but never was able to realize "his dream" in doing so. Mr. Rios continued by saying:

And I always wanted to be dentist so we had a real interesting conversation. She said, "Why didn't you do that?" I said, "Because I think that was the first" – I

> know now, that that was the first form of institutional racism that I had encountered as I look back. I sat down with the advisor at Del Mar College and he was an old gentleman, he was an Anglo, and he said, "What do you want to do?" And I said, "I want to be a dentist." That was lifelong dream. I wasn't very strong in science and math but I wanted to be a dentist. He didn't tell me no but he said, "Okay, but here is what you have to take. Chemistry, Physics, Biology." All the "ologies" and "ics" there were and it scared the hell out of me. And I went home and said, "I can't do that. I cannot take all that science." Well little did I know later that I didn't have to take it all in one semester. And so while it was a little thing, and he didn't say that I could space it, you've got four years, eight years, whatever, he didn't tell me all that. And I don't know if the guy even knew it, but when I got to North Texas and started hearing these things called, these terms called institutional racism and stuff and I started to look at the black plight and all that stuff. I thought, "Hell, we're (Mexican Americans) the same thing." And that's what happened to me. It was institutional; the guy didn't even know that he did it.

A follow-up example that Mr. Rios uses conveys how he "became aware" of the prevalence of institutional and systemic-type racism at the district in which he was employed. He had "half-heartedly" lead programs for Hispanic Awareness Month at this "affluent, primarily Anglo" school and enrolled in an administrator certification program during the first year of employment. One of his program intern assignments required him to be work in a middle school with a majority "Hispanic" population. As he recalled:

> And I began to see some things and I began to realize that we (the Mexican American community) need help and maybe I can help. And I remember, I didn't realize that I had changed and was headed more toward that *onda* [way of thinking] until I was with some of my old pals from the school where I taught. We were, you know, having a few Pepsi colas and eating, maybe like a Happy Hour type thing, and they were all Anglo. And I remember, I guess crusading or championing the down-trodden Hispanic at this particular school. And one of the people in the group said, "You really believe all that? I mean I can't believe you're talking like this." And I wasn't being Brown Beret-esque, I was just saying that we've been left out of the picture. I realized then that I had changed and I maybe had come back to the roots or did associate somewhat, in a milder form, with the José Ángel Gutierrez' and all that.

Mr. Rios had explained to me earlier that he did not always agree with groups such as La Raza Unida Party. As a child he had grown up in South Texas and although he realized that all was not fair, he felt that growing up in his neighborhood, surrounded by his friends and family, he was not disadvantaged by discriminatory practices. If the school did not make them feel welcome at school dances, it was not something that caused internal strife. He and his friends would have their own party to rectify the situation. So, I asked Mr. Rios if a discussion of race and racism had a place in the current political atmosphere or if a more assimilationist-type strategy would be more beneficial to the Mexican American community and STAS. He shared how he and a colleague played an outsider role in leading the fight against racist, district policies. He stated:

> I think we need to reach a median (in discussing racism and discrimination). See, the *palomía* [brothers] in North Texas, the Hispanic *palomía* [brothers] who are administrators and teachers, with some exceptions, did not want to affect their comfortable life style. And so, they experience levels of discomfort whenever we would bring up those kinds of issues, which had to be brought up and which they wanted to bring up.

Mr. Rios describes their fear and exclaims that he is "afraid too." But by returning to his example of "throwing *chingasos* [punches]," he makes it clear that a racial discourse even within the current hostile political climate is necessary as a Mexican American leader. He's critical of Mexican American administrators and attributes their lack of racial discourse and critique of institutional racism to their aversion for "discomfort." He states:

> I mean, I have kids, I don't want to lose my job. My dad taught me security, you know, you get a job and you stay there…We want to throw some punches but don't let it affect my lifestyle. And we have to create a certain level of discomfort to the powers that be because we have been very content to just do what we do in South Texas. Remember, I say this all the time and it probably has no historical merit or truth or historical fact to it, but we (Mexican Americans) were here in Texas, in Mexico. We were wearing our white little outfits, as they portray us in the movies, with our little hat and we were working the land and then this white guy rode up on this horse and said, "Now I own this land and you work for me." And what did we do, "Well, when is our first break?" You know, we didn't fight.

> And I'm being facetious of course, but I have to say to this point it still exists. Do not threaten my comfort level because I am afraid of that.

The "resignation" of Dr. Felipe Alanis, former Commissioner of the Education, and the lack of Mexican Americans or people of color at the top of the agency hierarchy are major racial issues that he feels need to be addressed by the STAS. He describes how he has requested that a "nicely-crafted letter" be sent to the new Interim Commissioner of Education, Robert Scott in an effort to convey their dissatisfaction with diversity in leadership, however as he states:

> I get frustrated sometimes with my brethren down here because they've never had to throw the *chingaso* [punch]… Where's the brown face on the top management team? Besides Nora, whatever her name is? Hancock (TEA Associate Commissioner for Planning, Grants and Evaluation). Alright now, I don't know Nora, and I'm sure she's a wonderful woman but he (interim Commissioner Robert Scott[34]) put his five people (gesturing to an imaginary organizational chart). You know, you've got Cloudt (TEA Associate Commissioner for Accountability and Data Quality), whoever else, whoever else, Flathouse (TEA Associate Commissioner for School Finance and Compliance), Nora Hancock and whoever else. He didn't even have the fuckin' decency, sorry, he didn't even have the decency to put Ibañez (her full name is Nora Hancock- Ibañez) up there. To me, that is an aggressive shot across the bow to us saying, "We don't care if you are 60% of the population. I'm not going to mirror the population in my cabinet."

[34] Robert Scott was previously a political appointee under Commissioner Robert Moses. After Moses resigned, Scott was employed as Governor Rick Perry's senior educational advisor. Scott is an attorney with no administrator or teaching experience.

> Now to me that was a blatant, a blatant shot…So, I thought also that we (STAS) need to also fire a letter, a position from that. When I talked to my people at Region One I said, "We need…" "Oh yeah, that's awful we need to bring it up!"

He uses this issue to ask rhetorically why STAS leadership did not make a major issue of Alanis' departure and along with him, his Mexican American deputy, Dr. Paul Cruz. He recalls a conversation he has had with a remaining Mexican American supervisor at the Texas Education Agency:

> I talked to somebody over there, one of the lieutenants, the minor lieutenants, I said, "Hey, any *raza* [Mexican Americans, literally meaning "the race"] left up there?" They said, "Shit, few and far between." And so that to me sends a message to us that we need to stand up at this point. And stand up and say, "Yeah, yeah, yeah, yeah, we hear what you're saying, that we're in the game, that we're your best friends, but we're going to stay right here to make sure that that's the case." And I don't see that happening. It's not within our culture. It's within some of us who've had to throw (*chingasos*), and trust me, I mean like I said I've got a kid in college, I've got a kids that lives in North Texas with her mom in a private school because that's where she wants her. I've got a mortgage. I don't want to threaten my lifestyle. But I've done it all my life.

Mr. Rios relishes his role as outsider even within Mexican American administrator circles, however it sometimes is a lonely feeling to not have more support from his fellow Mexican American and Region One superintendent colleagues. I asked him about playing the "outsider" role and having that critical perspective. He states:

> It's not hard because I've always done it. It is different because these (Mexican American administrators from the Valley) are my people. And so, I go home frustrated often and tell me wife and say, "They just don't get it honey. They don't get it." It's a lot easier fighting a white or black guy because they are not us and I can't get us, and maybe I won't…"*Es que no lo conozco la palomía* [It's just that I don't know these guys]. I don't know where their perspective is." Up there (in North Texas) I knew. We were behind (in the fight for equality and equity). And over here, we're all supposed to, I thought we would all stand up to the plate, with exceptions because not all will do it. But I thought the leadership would stand up and maybe they will in their own way because they are very good people. I want to make sure (and stress that they are good people with good intentions)…It's just a different *onda* [way of thinking and living].

Like Mr. Gutierrez, leaders within educational leadership organizations recognize Mr. Rios as an "outsider" and someone who will advocate for his constituency. But the manner in which they receive his opinion and beliefs is degrading and disrespectful. He describes several instances in which he attended statewide educational meetings and conferences and he states:

> You know, that's what I do. And a lot of people don't want to be around you when you are like that because it threatens and it establishes a discomfort level. And Anglos see you and they say, "Hmm, there he is, all he's going to talk about is that racial bullshit." Well, the Katy's and the Cy-Fair's and the Highland Park's need to hear that. I don't like to go into a room and they'll go, "Ah, shit!" You

know, that's what happens. I'd like to be able to stand with five, six, seven or eight different *palomía* [brothers] feeling the same way.

He notices that many times he is aligned with African Americans on issues and that they are subjugated to the same treatment.

Interviewer: How are African Americans received with they bring these types of issues to the discussion?

Mr. Rios: Same thing. You know, the same thing. But it's expected. Kind of like, "Here they come again." African Americans are very united. We saw it up there (in North Texas) all the time. By God, when they went to a board meeting and said they were going to take action, whether you liked it or not, they boycotted the bread factory or boycotted this or that. They have strong that strong reverend. They say it goes back to the slave days when they had to look to the church for support. We don't. We attack it each other. "*N'ombre, ese vato ta loco*. [No way man, that guy is crazy.]" And that hurts us.

Conclusion

The eight superintendent participants are politically active, experientially grounded in work ethic values, and strong believers in the positive difference that educational success provides. They are examples in their communities – play the game, demonstrate determination, make no excuses. Simultaneously, public advocacy and activism are part of the identity. Most are cognizant that the school finance system continues to disadvantage the Rio Grande Valley districts but they choose to participate in the democratic process – testifying, organizing, lobbying and recruiting. The role that race and racism has played in their lives is transparent in many ways. They speak of

Mexicanos, unity, unfairness and inequity while also refusing to utilize a racial discourse for the purpose of political organizing and analysis.

In the next chapter I will examine the school finance policy that we introduced in this chapter. How do the superintendents frame the debate? Do their personal backgrounds, political nature and conceptions of race and racism influence their public and private discourses? How could this contextual analysis lead toward a critical race analysis of school finance policy and advantage those districts that have historically been left out of the debate? Understanding how the superintendents place themselves within this discourse is vital to understanding their policy-making strategies and political activism.

CHAPTER V: POLICY AND POLITICAL DISCOURSE ANALYSIS

Introduction

Fowler (2000) has stated that the "overall objective of policy analysis is to improve the quality of public policy," (pg. 19). She elaborates (pg. 18) that "policies are evaluated in order to determine if they work the way they are supposed to" and contends that rational, common-sense policy analysts examine policies in an effort to inform policymakers, administrators and the general public. Her evaluation method could prove helpful in an analysis of the school finance policy and superintendent discourse findings provided in this chapter. Although her framework is employed by policy analysts attempting to inform policymakers, influence the political process and shape policy solutions, it de-emphasizes race and racism as a variable or phenomenon to be considered when evaluating policy judgments, assumptions and proposals. Lacking an understanding of race and an outright denial of racism, such a methodolgoy taints the "rational" framework from which most policy analyses is conducted (López, 2003) and has enormous ramifications for communities of color and their school children (Brady et al., 2000; San Miguel & Valencia, 1998; Valencia, 2002b).

Education policy in general has rarely been examined from a critical race policy analysis perspective (Parker, 2003, pg. 154). It is discouraged by a society that promotes arguments favoring color-blindness, meritocracy, and the myth of the "American Dream" (Crenshaw et al., 1995; Delgado & Stefancic, 2001). Parker (2003) argues that "qualitative analysis connected to Critical Race Theory serve to document the counternarratives of discrimination that should be heard and recognized by the courts," (pg. 147). Brady, Eatman and Parker (2000) demonstrate this type of research in their

review of historically black colleges and universities (HBCUs). In their article they quantitatively analyze the disparities in funding attributed the HBCUs and their counterpart, Traditionally White Institutions (TWIs). As previously mentioned, racial minorities in Texas public education have historically been denied equal opportunity vis-à-vis state policy (Acuña, 1988; Cardenas, 1997; San Miguel & Valencia, 1998; Valencia, 2002b; Wilson, 2003) and the courts have also denied the counternarratives that lend credence to discrimination and racism.

The current school finance policy and debate surrounding reform of the school finance system has not been critically reviewed, despite the fact that political culture, societal values and state policy have assisted in the maintenance of the dominant, Anglo population. State funding policy secured an inequitable mechanism for funding public schools, while the evolution of the school finance system in Texas was not significantly changed since the creation of the state. Rather, property rights, local control and a traditionalistic political culture continue to dominate decision-making and determine who should be educated, the type of education children should receive, and the amount of resources available for education (Cardenas, 1997). The major structure for maintaining power and inequity continues to be Texas' school finance system.

Currently, children of color do not have equal access to educational opportunity (Solórzano & Delgado Bernal, 2001; Valencia, 2002b; Valenzuela, 1999) and the school finance system is one of the significant causes of this unjust outcome. Race should be a factor used to consider and analyze education policy (López & Parker, 2003; Moses, 2002). Such critical analysis initiates a multi-step process that seeks to inform policymakers, education administrators and the citizenry. Completing a critical race

policy analysis such as the one conducted by Brady, Eatman and Parker (2000) and arguing for race-conscious education policy as does Moses (2002) gives voice to marginalized communities and enhances the policy dialogue. In this chapter, I conduct a critical race analysis of Texas school finance policy by examining three chapters of the Texas Education Code (TEC). The chapters contain provisions that when examined from a critical race perspective demonstrate an institutional racism embedded within the school finance structure and its funding formulas. Although additional funding has been generated since the adjudication of the Edgewood court cases, poor and majority-Mexican American school districts continue to be disadvantaged by the statute, specifically TEC, Chapters 42, 41 and 46, and its emphasis on property value. In an effort to understand how Mexican American educational leaders participate within the policy-making process, the second section of this chapter examines the participant discourse regarding school finance policy. Compiled primarily during the second of two interviews conducted with each of the participants, the data is also enhanced from my journal entries and personal reflections. Finally, the third section analyzes the public testimony given to the Texas Legislature by the three of the participant superintendents at two separate legislative hearings during the 78th Regular Session of the Texas Legislature during committee meetings investigating the elimination of the school finance system known as "Robin Hood."

School Finance Policy Analysis

Intense political action and court challenges brought about substantial changes to the school finance system. Local districts received additional funding and legislative appropriations supplemented local taxation (Clark, 2001; Farr & Trachtenberg, 1999;

Walker & Casey, 1996). Yet despite Rodriguez v. San Antonio (1973) and all four Edgewood cases, the state funding mechanism still utilizes the property value of the local district as the primary factor in generating state funds – a variable that at its foundation, disproportionately disadvantages poor, majority-Mexican school districts. Provisions outlined in the Texas School Law Bulletin (2002)[35] demonstrate how a district must tax itself locally, be willing to increase their tax rate for an increase in funding and rely on legislatively-approved appropriations to set a yield that will fund an "enrichment" program. Specifically, TEC, §42.251 (b) states that a district's academic program shall be financed by:

(1) ad valorem tax revenue generated by an equalized uniform school district effort;

(2) ad valorem tax revenue generated by local school district effort in excess of the equalized uniform school district effort;

(3) state available school funds distributed in accordance with law; and

(4) state funds appropriated for the purposes of public school education and allocated to each district in an amount sufficient to finance the cost of each district's Foundation School Program not covered by other funds specified in this subsection.

This final provision has the potential to be especially damaging to school districts that rely primarily on state funding for maintenance and operations. The districts, disadvantaged by the state's historical reluctance to provide "sufficient" funding from the state's coffers, are required to operate under state funding formulas that institute a racial

[35] For purposes of this study and the analysis in this chapter, most data and all statutes used come from the 2002-03 school year.

hierarchy detrimental to majority-Mexican American school districts. A descriptive analysis of statewide, regional and local district student enrollment and revenue statistics provides context from which the view this phenomenon.

Data gathered from the Texas Education Agency's Public Education Information Management System (PEIMS) illustrates statewide student enrollment and total revenue for the state's 1,038 independent school districts across its twenty regions. Approximately 4.2 million school children attend Texas public schools of which the majority is Latino. White students make up the next largest racial group while African Americans make up the third largest group of students.

Table 1

Racial and Ethnic Distribution of School Children, 2002-03

Group	Native Amer.	Asian/Pac Is.	African Amer.	Latino	White
# of Students	12,973	118,973	583,511	1,776,326	1,671,879
% of Total Student Population	0.31%	2.86%	14.01%	42.66%	40.15%

Note. Data from this table was compiled from the 2002-2003, Texas Education Agency (TEA), Public Education Information Management System (PEIMS) database.

Total revenue generated for district operations, maintenance and debt service is approximately $29.4 billion. The majority of revenue for schools – almost 52% – was

generated at the local level while state appropriations provided the next largest portion – approximately 40% – of local district budgets.

Table 2

Distribution of Total Revenue, 2002-2003

Account	All Funds	All Funds %	All Funds Per Student
Total Revenue	$29,390,422,346	100	$6,932
Local Tax	$15,224,658,397	51.8	$3,591
Other Local	$1,277,976,328	4.35	$301
State	$11,874,718,623	40.4	$2,801
Federal	$1,013,068,998	3.45	$239

Note. Data for this table was compiled from the 2002-2003, TEA, PEIMS database.

A regional and district-level analysis of the 2002-2003 school year data further clarifies how the study participants and the South Texas Association of Schools (STAS) member districts that they represent are affected. The fifty-nine STAS districts (thirty-seven from Region One and twenty-two from Region Two) serve over 403,000 Texas school children or approximately 9.7% of the state's student population. The STAS schools are overwhelmingly Latino and economically-disadvantaged, 91% and 79%, respectively. Only 7.6% of STAS student population is White and an infinitesimal .99% is African American. Furthermore, when Latino student population is analyzed from a statewide perspective it is found that one-fifth or 21% of the state's Latino students are in

STAS member districts. The STAS member districts generate total revenue of $2.7 billion, representing approximately 10% of total revenue statewide.

As stated in previous chapters, seven current superintendents and one recently-retired superintendent participated in the study. The seven districts that are lead by the participant superintendents are not surprisingly comparable to the STAS member districts in their demographic makeup. The participant districts educate a combined 112,300 students, 73.6% of which are economically disadvantaged and 30.8% of which are classified as Limited-English Proficient (LEP). Examining the individual districts in Table 3, the student demographics become more pronounced when factoring in the skewing effect that the Karankawa ISD has on the total percentage Latino and economically-disadvantaged. The only district not located in the Rio Grande Valley, it consists of a more diverse student population and is the largest district in the study.

Table 3

Superintendent and Student Demographic Data for Study Participants

Superintendent	District	Students	% EcoDis	% Latino	% LEP	% White
Henry Tamez	Algodón ISD	2,102	82.7	95.1	12.1	4.9
Hector Sobrevilla	Snowbird ISD	10,934	91.1	98.7	51.3	1.1
Chuy Gutierrez	Oso ISD	25,186	90	98.6	37.4	1.2
Manuel Lira	Azúcar ISD	2,691	93.2	99.9	52.5	0.1

Andres Rios	Cuatro ISD	30,655	72.9	97	47	2.3
José Ybarra	Nopalito ISD	1,503	82.2	96.1	18.5	3.5
Joe Treviño	Karankawa ISD	39,268	56.7	71.9	8.1	20.8

Note. Data for this table was compiled from the 2002-2003, TEA, PEIMS database.

The participating districts generated $750.7 million in total revenue in 2002-2003, 76.9% of which was provided by state aid. Only 28.9% was raised locally. Illustrating the fragility in which most STAS districts operate and highlighting the vital nature of state appropriations for the funding of their schools. State and court-imposed reliance on property value and historically-limited state appropriations severely disadvantages participant and STAS school districts. Without a method for raising funds locally, superintendents and educational leaders are left with few options. In the following subsection, I examine three chapters of the TEC and subject the statute to a critical race analysis. By first providing an overview of the educational provisions from a macro perspective, I lay out the statewide inequity phenomenon that has disproportionately affected poor, majority-Mexican American school districts.

A Continued Reliance on Property

The Texas school finance system was created as a foundation program in which funding tiers provide a basic academic program cost and an enrichment academic program cost. The costs are shared by local taxes and state aid. In TEC, Chapter 42, the

state provides equalized funding for the "basic" academic program through Tier I state aid formulas and through an "enrichment" program funded by Tier II state aid formulas. Tier I formulas calculate the state and local cost of the regular academic program and require a district to tax a $.86 local tax rate to meet the local share of Tier I. Tier I funding includes according to TEC, §42.002 (b) (1) (A), "sufficient financing" for districts to provide "a basic program of education that is rated academically acceptable or higher." The basic allotment amount[36] is codified every legislative session and is used as a base in calculating an adjusted basic allotment in which district size[37] and special populations[38] are taken into account. Once the adjusted allotment is calculated, a district's local share is determined using property values and tax effort. As with other aspects of the school finance formulas, the amount of state aid generated is inversely proportional to the district's property wealth.

The second tier of funding is similarly designed to provide districts with equalized funding however it is meant to go beyond the cost of the regular academic program. State aid is based on a formula in which a guaranteed yield per the district's weighted average daily attendance (WADA), property value and tax effort are considered in determining state aid (Walker & Casey, 1996). Consistent with Tier I funding is the prominent role that property value plays in the generation of state aid. While student enrollment and characteristics do account for adjustments to funding levels, it is not the primary variable in determining revenue. In fact, an essential fact that is often

[36] In the 2002-03 biennium, the Texas Legislature set the basic allotment amount of $2,537 in TEC, §42.101.
[37] See Texas School Law Bulletin, TEC, Chapter 42, Subchapter B outlines adjustments for small and mid-sized districts and cost of education, pgs. 269-271.
[38] See Texas School Law Bulletin, TEC, Chapter 42, Subchapter C outlines adjustments for special education, bilingual education, career and technology, compensatory education, transportation and other student populations, pgs. 271-277.

overlooked when considering the calculation of the "basic" and "enrichment" programs is that neither is based in real-world or "scientific" analysis. The Court permitted a funding "gap" of $600 per-student with its Edgewood IV ruling and abandoned this standard in its appropriations and setting of basic allotment and guaranteed yield amounts. As will be explored later, this constitutional "gap" in essence legalizes inequity.

As shown in Table 4, 2002-03 property-wealth data compiled from the Texas Education Agency demonstrates how districts disadvantaged by the ruling in Edgewood IV and the Tier I and Tier II funding formulas are those with majority-Mexican American student demographics.

Table 4

50 Poorest School Districts as Measured by the Texas School Finance System

Number of Districts	% of 50 Districts	% Latino
38	76%	50% or more
35	70%	70% or more
29	58%	77% or more
24	48%	95% or more

Note. Data compiled from 2002-2003, Average Daily Attendance (ADA) and Comptroller Property Tax Division (CPTD) data, TEA, School Finance and Fiscal Analysis Division.

Seventy-six percent or 38 of the 50 poorest school districts according to property-wealth per average daily attendance (ADA) were majority Latino in the 2002-2003 school year, while 48% or 24 of the 50 poorest districts were at least 95% Latino. This data also clarifies how districts in the Rio Grande Valley districts lead by the participant superintendents and STAS member districts fare under the school finance system. Twenty-one or 42% of the 50 poorest school districts reside in Region One and participate as members of the STAS. Of the seven superintendents interviewed and observed for this study, four head-up districts that among the state's 50 poorest (see Appendix A, Table A1 for a complete list of the 50 poorest districts).

When the same data is used to analyze the 50 wealthiest school districts, 76% of the wealthiest districts are majority-White and 35% of the 50 wealthiest districts are at least 75% White. Three majority-Mexican American school districts are on the 50 wealthiest school district list; however, all three are sparsely populated, consist of low student counts and have high property value due to oil, gas and mineral-rich land and/or portions of ocean-front property not enjoyed by the predominantly-Mexican American communities. The districts have 96%, 95%, and 72% Latino student demographics, respectively. Despite their apparent property-wealth, the district leadership participates in the STAS organizational and political efforts (see Appendix A, Table A2 for a detailed list of the 50 richest districts).

Combined with the state's reluctance to adequately or equitably fund all school districts, these majority-Mexican American school districts are further disadvantaged by their reliance on state funding as their primary source of revenue. For the 59 STAS member districts, only 5.5% of their total revenue is provided by the federal government,

while 28.8% is generated at the local level. The majority of their funding comes from state appropriations. In the case of these districts, state revenue accounts for 63.6% of their total funding (see Appendix B, Figures B1, B2 and B3 for a distribution of STAS total revenue). Analyzing the participant superintendents' districts, the reliance on state aid is even more striking.

Table 5

Participant District Total Revenue, 2002-2003

District	% Fed	% Local	% Other	% State
Algodón ISD	7.3	11.8	2.2	78.6
Azúcar ISD	9.7	10.7	0.5	79.1
Cuatro ISD	5.5	34.7	2.3	57.5
Karankawa ISD	4.1	41.7	3	51.2
Nopalito ISD	6	14.9	2.2	76.9
Oso ISD	6.7	16.1	1.2	76.1
Snowbird ISD	5.8	10.4	1	82.8

Note. Data was compiled from 2002-2003, Texas Education Agency, PEIMS database.

Cuatro ISD and Karankawa ISD skew the data due to their ability to raise a higher percentage of total revenue from local sources. Although both have significant numbers of economically-disadvantaged and LEP students, they are situated in economically-developing areas of South Texas with growing tax bases. In addition, Cuatro ISD has a relatively low maintenance and operations tax rate – $1.32 – approximately eighteen

cents below the state limit. It thus has the capacity to raise funds locally and via the state funding formulas. Conversely, Algodón ISD, Nopalito ISD and Snowbird ISD generate the large majority of their total revenue from state resources but have all reached the $1.50 tax rate limit. They no longer have the capacity to increase funding be it state, local or otherwise.

The TEC does not factor in districts that have reached the $1.50 tax rate limit and that are overly reliant on state funding. Although districts are limited to a Tier II tax rate of $.64,[39] the "desire" a district has in increasing its tax rate will determine its increased generation of funds. As stated in TEC, §42.301:

> The purpose of the guaranteed yield component of the Foundation School Program is to provide each school district with the opportunity to provide the basic program and to supplement that program at the ***level of its own choice*** (emphasis added). An allotment under this subchapter may be used for any legal purpose other than capital outlay or debt service.

As with Tier I, a district's allocation of Tier II state funds is inversely proportional to its wealth.[40] The poorer the district as measured by property value, the higher the percentage of state funds the state will send them (Walker & Casey, 1996). However, the "choice" a district has in raising its Tier II tax rate in an effort to increase state funding is, as documented in the case of several STAS school districts, nonexistent.

Prior to the state court victories brought about by the Edgewood plaintiffs, tremendous inequity existed between districts with high property value and those with

[39] See Texas School Law Bulletin, TEC, §42.303 limits a district tax rate in the "enrichment" program to $.64. Combined with the limit on Tier I of $.86, a district is limited to $1.50 maintenance and operations tax rate.
[40] See Texas School Law Bulletin, TEC, Chapter 42, Subchapter F, pg. 285-287.

low property value. Districts capable of taxing themselves minimally were able to raise more funds than those taxing themselves to their limit (Cortez & Montecel, 2003). The Edgewood plaintiffs, lead by MALDEF attorneys, sought to remedy this occurrence and eliminate any inequity with its "equal protection clause" argument; however, the Texas Supreme Court ruled otherwise choosing to favor the "efficiency" argument promoted by the Equity Center plaintiffs. The ruling resulted in an improved school finance system but also solidified Texas' reliance on property values as the primary determinant of school funding.

Today, state law mirrors what the Texas Supreme Court ruled in Edgewood IV. In TEC, §42.001 (a), the legislature codified state responsibility for education but it also sanctioned inequity for some students. The code states:

> It is the policy of this state that the provision of public education is a state responsibility and that a thorough and efficient system be provided and substantially financed through state revenue sources so that each student enrolled in the public school system shall have access to programs and services, that are appropriate to the student's educational needs and that are ***substantially equal*** (emphasis added) to those available to any similar student, notwithstanding varying local economic factors.

The concept of "substantially equal" opined by the majority of justices in Edgewood IV inspired policymakers to change system but it also provided the opportunity to legislate inequity. Despite the fact that 86% of the state's school districts now receive some amount of "equalized" funding, 11% are required to "share" funds with the state and 3% are neither "equalized" or forced to "share," some experts point to this section of the code

when arguing that the finance system has not changed even though some of the poorest districts have been lifted to a basic level of funding (Cortez & Montecel, 2003; Montgomery, 2003; Walker & Casey, 1996). The burden remains on local property values, forcing low-wealth districts, many of which consist of predominantly Mexican American school children, to rely on the state for funds.

The "Robin Hood" Provisions

The main feature of the restructured school finance system and its funding formulas is the "recapture" provisions in TEC, Chapter 41. These provisions require property-wealthy school districts – those with a property value per weighted average daily attendance (WADA) that exceeds $305,000 – to choose one or a combination of at least two of five options in achieving the so-called "equalized level." The options include, as stated by TEC, §41.003:

(1) consolidation with another district as provided by Subchapter B;

(2) detachment of average daily attendance credit as provided by Subchapter D;

(3) purchase of average daily attendance credit as provided by Subchapter D;

(4) education of nonresident students as provided by Subchapter E;

(5) tax base consolidation with another district as provided by Subchapter F.

With the Texas Supreme Court ruling of the constitutionality of Senate Bill 7 in Edgewood IV, districts were given these five options under the law in determining how they would want to send back funds to the state or "share" their wealth with poor districts.

According to TEA 2002-2003 school year data, only 105 school districts, or 10.13% of the districts in the state of Texas were considered Chapter 41 and required to

select one or more of the options of recapture. Twenty-seven school districts were considered "gap" schools that did not generate Tier II funds from the state and also did not have funds recaptured in the state aid formulas. In other words, districts which generated between the guaranteed level of $271,400 wealth per WADA and the recaptured wealth level of $305,000 were unaffected by either TEC, Chapters 41 or 42.

Districts which were capable of generating above $271,400 wealth per WADA were legally able to have more funding per student. The "recapture" provisions hardly institute an "equitable" system as professed by many in the school finance debate; rather, they legitimize and codify state-sanctioned inequity. Nonetheless, most school districts benefit from the "substantially" equalized funding system and reach a certain level of equity, regardless of the political nature of how the guaranteed and recapture levels were codified.

The 105 recapture districts provided $962.1 million to the state and property-poor school districts in school year 2002-2003.

Table 6

Districts with the Majority of the 2002-2003 Recapture Cost

Rank	District	Recapture Cost	Cum % of Total Recapture	Cumulative Total
1	Austin ISD	$139,238,091	14.47%	$139,238,091
2	Plano ISD	$117,983,118	26.74%	$257,221,209
3	Highland Park ISD	$57,788,110	32.74%	$315,009,319
4	Carrollton-Farmers Branch ISD	$52,590,091	38.21%	$367,599,410
5	Eanes ISD	$51,121,251	43.52%	$418,720,661

6	Richardson ISD	$48,389,624	48.55%	$467,110,285
7	Deer Park ISD	$36,862,339	52.38%	$503,972,624

Note. 2002-2003 Chapter 41 district and cost data was collected from the TEA, School Finance and Fiscal Analysis Division.

As demonstrated in Table 6, the majority of this cost was borne by only seven districts. These seven districts combined for 52.4% or approximately $504 million of the total recapture cost. Four districts from the Dallas-Forth Worth area were included among the top seven districts. Two of the districts were in the Austin or Central Texas region, while one was in Harris County or Houston region. Students attending these seven districts total 214,000 or 5.1% of the total student count for the entire state.

The top twenty school districts in terms of total recaptured costs account for 75.4% of the total recaptured costs and educate only 7% of the statewide student population. White students are most affected by the recapture provisions. Of the total student population attending recaptured schools, 55% are White, 28% Mexican American and 11% African American. Figure 1 exemplifies the disproportionate representation of white students in some of the wealthiest school districts in the state.

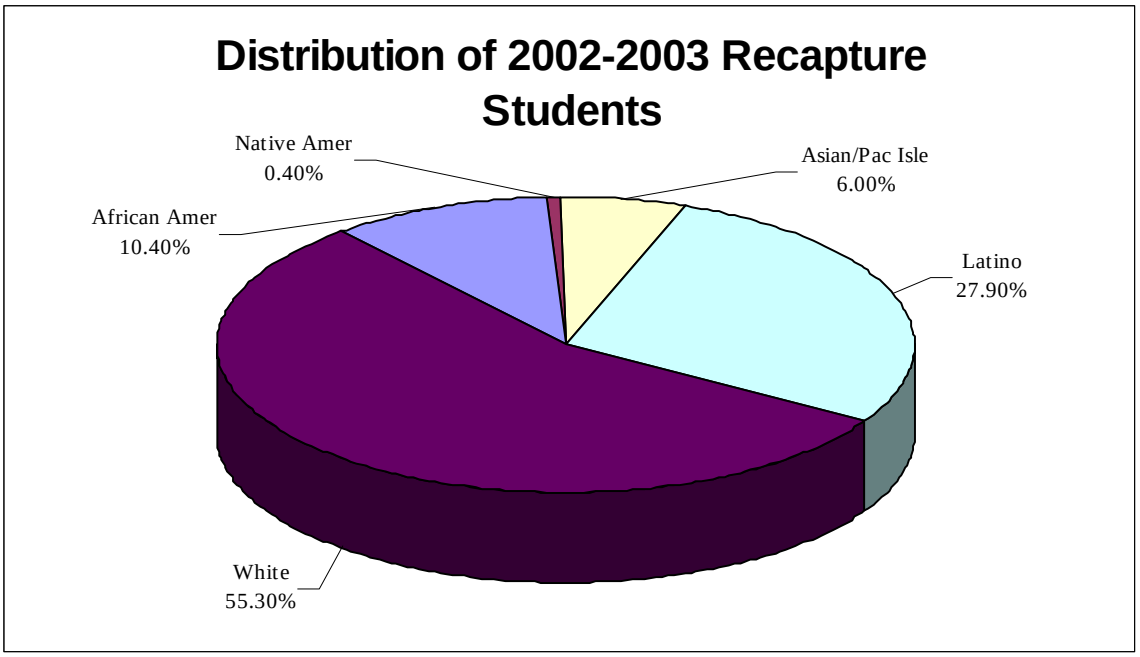

Figure 1. Data from the2002-2003 school year was compiled from the TEA, School Finance and Fiscal Analysis Division. The data was used to calculate the distribution of students in "recapture" districts by racial and ethnic makeup.

Returning to the "substantially" equal argument made by the Court in Edgewood IV, the rich, predominantly-White school districts are advantaged by the school finance system in that they are legally entitled to more funding per student than poorer, predominantly-Mexican American school districts. Six of the seven districts lead by participant superintendents generated less funding per student than did the seven recaptured districts reviewed earlier. Austin ISD and Nopalito ISD are the lone anomalies due to their high concentration of low-socioeconomic status or economically-disadvantaged students. Table 7 illustrates how per pupil spending is in most cases

higher in property-wealthier school districts when compared to the STAS, participant districts.

Table 7

Comparison of Funding per Student in Seven Wealthiest, Seven Participant Districts

District	Total State/Local per Student	Total Funding per Student
Eanes ISD	$8,298	$8,984
Nopalito ISD	**$7,929**	**$8,637**
Carrollton-Farmer's Branch ISD	$7,538	$8,114
Plano ISD	$7,379	$7,981
Highland Park ISD	$7,250	$7,792
Richardson ISD	$7,073	$7,544
Deer Park ISD	$7,026	$7,473
Algodón ISD	**$6,997**	**$7,738**
Austin ISD	$6,697	$7,147
Snowbird ISD	**$6,609**	**$7,093**
Oso ISD	**$6,379**	**$6,922**
Azúcar ISD	**$6,232**	**$6,940**
Karankawa ISD	**$6,159**	**$6,631**
Cuatro ISD	**$5,730**	**$6,212**

Note. Data was compiled from 2002-2003, TEA, PEIMS database. The bolded districts are those which had superintendents that participated in this study. Total State/Local is state aid, while Total Funding includes state and federal funding.

On average, the Chapter 41 districts have $859 more per student in state and local funding than do the participant school districts. The largest discrepancy in funding is exhibited by Cuatro ISD which has $2,500 less per student in local and state funding than does Eanes ISD. If Cuatro ISD was provided with the $2,500 difference in funding per student for each of its 30,600 students, the district would generate an additional $78.5 million for its budget. The additional funding generated for Karankawa ISD, Azúcar ISD, Oso ISD, Snowbird ISD, Algodón ISD would be $83.5 million, $2.3 million, $48.4 million, $18.4 million, and $2.7 million, respectively. The additional funding would amount to a total of $234.2 million in 2002-2003.

TEC, Chapter 41 has traditionally contained the school finance system's most controversial provisions. The media and public have named it "Robin Hood" in large part because of the conception that the state requires districts to give back "their" money, a form of stealing from the rich and giving to the poor. Furthermore, a false perception exists in which many believe that property-poor school districts generate more total revenue than do the property-wealthy school districts. Property-wealthy districts have framed the public debate with this negative connotation and filed litigation to overturn the criteria set out by the Edgewood cases. This provision lacks acceptance by a culture that values competition and individualism, rather than one based on equality. The struggle to eliminate Chapter 41 or "Robin Hood" exemplifies how ingrained the traditionalistic culture within state's political and social consciousness is.

Utilizing Debt to Re-Enforce Inequity

Edgewood I first presented evidence of disparate expenditures in school facilities funding to illustrate inequities and unfairness of the state's finance system (Clark, 2001;

Farr & Trachtenberg, 1999; Walker & Casey, 1996). By the time of the January 1995 Edgewood IV majority opinion, Justice Cornyn warned that the "evidence at trial shows that the lack of a separate facilities component has the potential of rendering the school finance system unconstitutional in its entirety *in the very near* future," (pg. 47). As a result, the state legislature finally appropriated funding for a limited facilities grant program in 1995. It was the precursor to the better-funded and more-inclusive Instructional Facilities Allotment (IFA)[41] program that was instituted in September 1997 (Clark, 2001; Walker & Casey, 1996). Two years later, the Existing Debt Allotment (EDA)[42] program was created to assist school districts with eligible existing general obligation debt (Clark, 2001). Although both the IFA and EDA or the so-called Tier III funding formulas have coexisted since 1999, districts that must rely on state funding to initiate facilities construction programs are once again at the mercy of the biennial appropriation process, as is the case with Tier II funding. If state funding via the IFA or EDA programs is not available or is insufficient to meet the demands of rising school enrollment or deteriorating, existing facilities, property poor districts in most cases can not begin construction projects. Majority-Mexican American school districts are subsequently at a disadvantage to attain facilities funding.

Many school districts typically issue bonds or borrow money to pay for major facilities construction or renovation projects, which is why the state has created and

[41] See Texas School Law Bulletin, TEC, Chapters 46, Subchapter A, Instructional Facilities Allotment, as well as Texas Administrative Code (TAC), §61.1032, Commissioner's Rules on Instructional Facilities Allotment.

[42] See Texas School Law Bulletin, TEC, Chapter 46, Subchapter B, Existing Debt Allotment, as well as Texas Administrative Code (TAC), §61.1035, Commissioner's Rules on Assistance with Payment of Existing Debt.

implemented the IFA and EDA programs as a method assisting districts in their repayment of bonds. As stipulated in TEC, §46.003 (a):

> A school district is guaranteed a specified amount per student in state and local funds for each cent of tax effort, up to the maximum rate…to pay the principal of and interest on eligible bonds issued to construct, acquire, renovate, or improve an instructional facility.

Thus, the IFA program distributes state funding based on property wealth: the wealthier a district, the less state funding it receives and more local funds it is required to raise. The inverse is required for poorer school districts. The EDA program provides funding similarly; however, the criteria for funding in this program are set by the definition of "eligible debt." In 2002-2003, eligible EDA debt was defined in TEC, §46.033 (1) as general obligation debt that:

> The district made payments on the bonds during the 2000-01 school year or taxes levied to pay the principal of and interest on the bonds were included in the district's audited debt service tax collections for that school year.

This "cut-off" date of 2000-01 forces districts to issue their debt prior without the assurance that the state will assist in the repayment of it. Higher-wealth districts are typically able to take the risk that the state will appropriate EDA funding. Those that are property-poor must delay construction projects or maintenance of deteriorating facilities, waiting for IFA funding because can't risk issuing debt without the state's assurance of assistance.

The STAS member districts exhibit this phenomenon in that they are more likely to benefit from the IFA program than the EDA program. Table 8 demonstrates the percentage of total IFA and EDA funding generated for the member districts.

Table 8

Comparison of IFA and EDA Funding for STAS Districts since 1997-1998

Year	IFA Total	% Total IFA	EDA Total	% Total EDA
2002-2003	$74,111,275	25.62%	$41,792,385	9.24%
2001-2002	$68,371,821	27.02%	$46,416,447	8.61%
2000-2001	$60,530,175	27.70%	$44,081,235	9.18%
1999-2000	$35,069,647	20.01%	$44,851,335	10.09%
1998-1999	$22,640,360	19.01%		
1997-1998	$7,973,722	12.36%		

Note. Data compiled is from the TEA, School Finance and Fiscal Analysis Division as well as the TEA, IFA website, www.tea.state.tx.us/school.finance/facilities/ifa.html. The data includes all state aid data since the inception of both the IFA in 1997-1998 and the EDA in 1999-2000.

In 2002-2003, the STAS member districts generated a total of $115.9 million in facilities funding, accounting for approximately 26% of the total IFA funding and only 9% of the total EDA funding. Since 1999-2000, the first year of EDA funding, the STAS districts have not garnered more than 10% of the total EDA funding. They have benefited more from the IFA program, and in 2000-2001, reached its highest percentage at almost 28%.

District-level facilities funding analysis of the seven participating districts shows they typically do not benefit from the EDA, or rely more significantly on IFA awards for facilities funding. For example, Table 9 demonstrates how four of the seven districts did not generate any EDA funds in 2002-2003. Because they did not issue "eligible" bonds or were already benefiting from the IFA program for the bonds they did have, the districts were not able capitalize on the states funding of EDA. Karankawa ISD and Cuatro ISD both earned substantial EDA monies, skewing the average percentage of the group of districts. The generally higher wealth per ADA status combined with the fact they exist in fast-growth, relatively economically-stable communities helped to qualify them for this money. Azúcar ISD, Nopalito ISD, and Snowbird ISD are excluded from the EDA program due to the stipulation that they issue debt prior to receiving assurance from the state of assistance. They cannot meet this criterion with their current economic conditions. Algodón ISD and Oso ISD received minimal EDA funding.

Table 9

Comparison of IFA and EDA Funding for Participant Districts, 2002-2003

District	IFA 03%	EDA 03%
Algodón ISD	62.04%	37.96%
Azúcar ISD	100.00%	0.00%
Cuatro ISD	24.94%	75.06%
Karankawa ISD	24.22%	75.78%
Nopalito ISD	100.00%	0.00%
Oso ISD	80.11%	19.89%
Snowbird ISD	100.00%	0.00%
Average %	54.88%	45.12%

Note. Data compiled is from the TEA, School Finance and Fiscal Analysis Division as well as the TEA, IFA website, www.tea.state.tx.us/school.finance/facilities/ifa.html.

The guaranteed yield rate for facilities funding in 2002-2003 was $35 per average daily attendance (ADA) per penny of tax effort. In other words, a district is provided state funds up to $350,000 per ADA. The higher the property per ADA level, the less the state portion and higher the local portion will be. A district must tax for its local share to maintain funding. However, this equalization process differs from the provisions for maintenance and operations because recapture does not exist. In the debt servicing or repayment process, property wealthy school districts are not forced to "share" their interest and sinking (I & S) fund tax collections as is required in the maintenance and operations (M & O) or Tier II funding formulas.[43] As was stated in the previous subsection, Chapter 42 provisions "equalize up" to a $271,400 wealth per WADA formula while Chapter 41 provisions require districts with property value per WADA in excess of $305,000 to select one or more of the five options to bring the district "down to an equalized level" as required by the state. This is meant to equalize tax collections generated from the districts M & O tax rate. However, TEC, Chapter 46, Subchapters A and B do not require that the districts I & S fund tax collections be equalized (Clark, 2001). Therefore property wealthy districts are able to issue as much debt and build as

[43] Interest and sinking or I &S tax rate is used by school districts to tax for the specific purpose of raising funds for general obligation or voter-approved bonds. A district is typically able to tax up to a $.50 I & S tax rate. The maintenance and operations or M & O tax rate is assessed for the specific purpose of maintaining the operations of a school district. A district is typically able to tax up to $1.50 M & O tax rate.

many facilities as their communities are willing to build and property poor school district are left waiting and hoping that the legislature will appropriate sufficient funding.

Finally, state appropriations for new IFA funding must be approved every biennium as does a change in criteria for "eligible" existing debt. EDA funding is permanently fixed in the state funding formulas, but IFA funding is not. Districts must compete for scarce funding every funding cycle. In the first six cycles of IFA funding, the TEA has run out of money every year but the first two. Districts clamor for shrinking coffers while the bulk of the facilities money has quietly been appropriated in the EDA program. Table 10 demonstrates how the state legislature has appropriated more funding for districts qualifying for EDA funding ($1.9 billion in four years) rather than in the IFA program ($1.9 billion in six years).

Table 10

Comparison of Per District Funding for IFA and EDA since 1997-1998

School Year	IFA Total Funding	# of Districts	Per District Funding	EDA Total Funding	# of Districts	Per District Funding
2002-2003	$289.2	400	$723,040	$452.1	532	$849,745
2001-2002	$253.0	370	$683,841	$539.3	570	$946,092
2000-2001	$218.5	308	$709,548	$480.0	570	$842,071
1999-2000	$175.39	264	$664,028	$444.7	623	$713,731
1998-1999	$119.1	220	$541,266			
1997-1998	$64.57	115	$561,120			

Note. Data compiled is from the TEA, School Finance and Fiscal Analysis Division as well as the TEA, IFA website, www.tea.state.tx.us/school.finance/facilities/ifa.html. The totals in the IFA Total Funding and EDA Total Funding are in millions.

In the four years that the programs have coexisted, the IFA has never had a higher funding per district level than districts in the EDA. The largest disparity occurred in 2001-2002 when districts awarded in the EDA program earned $262,251 more per district if they were awarded in the IFA. The state's two allotment programs are designed to assist school districts with repayment of district-approved debt; however, those issuing debt without the assurance of state assistance are more likely to generate more funding from the state. Districts not able to afford debt repayment solely on local tax collections remain disadvantaged. The state's facilities programs reinstitute inequity because rich districts generate more funding and have ability to collect I & S tax collections without the requirement of recapture. Majority-Mexican school districts are affected by this disproportionately.

Changes in the school finance policy have improved operational budgets, teacher salaries and school facilities for some of the poorest districts in the state of Texas (Cardenas, 1997; Montgomery, 2003). The state has been forced by court decisions to ensure equalized funding at the district level and although the constitutional criteria set by the court, including the $600 gap in per pupil funding have not been met, increased funding has assisted school districts which could otherwise operate solely on local funds.

The current tone of political rhetoric characterizes the school finance as being unfair to property-wealthly districts required to "give" poor school districts some of "their money." It has also been described as un-American or "stealing from the rich to give to the poor" and prevails despite the fact that in school year 2002-03, 88% of the 1038 school districts in Texas either were not affected or benefited from the "Robin

Hood" system (Montgomery, 2003). In the next two sections of this chapter, an analysis of participant superintendent discourse will be conducted. Evaluating how educational leadership debate and discourse the school finance system will assist in forming a critical race analysis of school finance.

Policy Declarations

After interviewing the eight participants for the first time, I sensed their frustration with their districts' financial situation. I approached each of them with the idea of discussing school finance policy along with the broader topics of equity, fairness, efficiency and adequacy. The second of two interviews provided an opportunity to better understand how they experienced, thought about and discussed one of the most controversial topics in Texas over the last thirty years – the funding of public schools and the inability for poor local districts to raise adequate funds. Each of the participants was well-informed, committed to their school children's success, and opinionated on the subject of school funding. The majority of them had publicly spoken on behalf of their districts or the STAS organization in front of legislative committees or in public forums. Our initial conversations established enough rapport to privately discuss issues of funding importance, adequacy, efficiency, and fairness, followed-up by a discussion of the term "Robin Hood." More district-specific issues such as ability to operate, improvements to the system and adequacy of funding levels were then introduced. Finally, a discussion on the racist nature of the current school finance policy was broached. As will be outlined in this section, not all superintendent participants were willing to think about and discuss the history and current state of school finance policy in this manner.

Embracing the Enormity of Funding

Economics of education, legal, and school finance scholars have all published studies regarding the significance of funding in improving student achievement. Some state that there is no measurable relationship between increased spending on students and their performance (Betts, 1996; Hanushek, 1981, 1986, 1991). Hanushek (1986) notes that "differences in quality do not seem to reflect variations in expenditures, class sizes, or other commonly measured attributes of schools and teachers," (pg. 1142). He (1981) further finds that "schools have consistently spent more on education each year" and even with this occurring, "a wide range of sophisticated and comprehensive studies of student performance indicates that there is no consistent relationship between school expenditures and student performance," (pg. 20). Others have found that increased funding does benefit society and individual schools significantly (Ferguson, 1991; Levin, 1989; Rothstein, 1997; Sweetland, 1996), often refuting those who would want to pronounce sweeping conclusions after employing flawed methodological frameworks. Sweetland (1996) states that an investment in "human capital" suggests that "individuals and society derive economic benefits from investments in people," (pg. 341). Finally, some scholars find that the "answer" to this often contentious debate is more cloudy than clear (Card & Krueger, 1992; Murnane, 1991). In an effort to gauge the participants' opinions of this correlation, I asked each one whether they believe money matters in the achievement of their students.

"Of course! Of course money matters"

Each participant superintendent affirmed that money does matter in the achievement of their school children. Not one participant purports that money is the only variable affecting achievement but they all clearly see that without funding assistance,

they would not be unable to provide quality services and programs. Chuy Gutierrez is most emphatic in his response to this seemingly rhetorical question. While conjuring up images of an uneven playing field, he accepts his district's responsibility for the educating all children. Mr. Gutierrez responds:

> Of course! Of course money matters. Money matters for low pupil-teacher ratio. Money matters for supplemental stuff, you know, above and beyond what you are doing. Of course, money makes a big difference especially when we have children that in our case, we feel they have special needs. We have, because of our proximity to Mexico; we have a tremendous amount of limited-English proficient students. I mean, you're not going to tell me that we don't need something special to teach these kids. Of course we do. Of course we do. We're not playing on the same field. We have people that come from the homes that unfortunately, come from homes that are very poor, not only speaking only Spanish but because their parents have to do other types of work, they don't spend a lot of time in educating them at the home. So we get them a little bit more unprepared, if you will. Those are the things that we (have to contend with), and yet, and yet we manage to compete with the state. We do well. So we don't complain because we're getting these students, just don't take away the resources.

Hector Sobrevilla reiterates Mr. Gutierrez' contention – funding matters because it gives districts the opportunity to provide services and programs that they would not necessarily be able to do solely on local funding. Mr. Sobrevilla states:

> *Este* [Ah], let me give you an example, if we didn't have any (funding), we've had different types of grants like the E-Rate and the TIF (Telecommunications

> Infrastructure Fund) grant, but if we didn't have those grants for technology for example we wouldn't be able to afford it (technology programs, equipment, resources). We can afford some of it (technology needs). If only we have a technology portion from the state that's not enough – not for what they want us to do. They want us to do what they call TEKS (Texas Essential Knowledge and Skills) applications which is essential elements applications on technology in grades 2nd, 5th, 7th and 8th. But if we don't have the equipment, it's going to be kind of hard.

State-mandated performance measures must be met by all school districts, regardless of their financial situation, a fact all participants realize. Aside from the state's accountability system, the superintendents believe it is the state's responsibility to provide a whole, well-rounded education. Although "equalized" funding system helps ensure at lest a basic academic program for most districts, the participants introduce fairness issues by evoking the ability of property-wealthy school districts to raise local funds for enrichment programs beyond what is considered a basic academic program. Henry Tamez once again affirms that money is essential to providing a quality academic experience – one that includes an enriched curriculum – and argues that his district should have the ability to offer an enrichment curriculum just as property-wealthy school districts do. He states:

> It's a no-brainer. I think money does matter. Short of what Glen Rose (a school district in the Dallas-Forth Worth area that is Chapter 41 or property-wealthy) is doing compared to what I'm doing, I think the money matters for the very rigor of academics. That's where I put the money needs, for the rigor of academics. I think

> if you want to go beyond just the typical academics of the reading, writing, arithmetic, and you want it to go into the real preparation for the kids going to into a four-year school. Laptops for example, you know, *ahorita* [right now] if you get out of high school without the complete knowledge, *ya* [that's it], you're not anywhere. I can tell you that at the high school, for example, I may have forty, fifty laptops roaming the school somewhere. I know of some districts, Chapter 41s, that probably have a laptop per child. Just to get teachers for the French, the German, the Biophysics, the Chemistry III, Chemistry II, *no lo tengo* [I don't have the funding]. I'm on the very basics, you know. And yet, I'm up against the same ruler (i.e. the state accountability system) as the (Chapter) 41 is. The scale is the same statewide. It isn't fair. It isn't fair. And you know, I don't have the money for the academic rigor that is essential for that kid to completely succeed at a four-year school.

Similarly, José Ybarra points to opponents of the "money matters" argument as those with sufficient funding who don't wish to have their local funds re-distributed:

> Yes sir, it does. You hear that (money doesn't matter) from the people that have the money and are being recaptured from (in the school finance system). They are saying it really makes no difference. Well, it does make a difference. Any time, now I'm not going to tell you that money is the answer to everything, but certainly with the appropriate resources you are able to offer those programs that your kids need, for your particular district.

Additional funds for special needs children represent another budgetary drain. Dr. Joe Treviño states, "I don't think there is any question in my mind that money

matters." He describes how "at-risk" school children "require more time, more programs, and more effort which are greater costs associated to a school district." Furthermore, he doesn't think poor districts should limited to providing only regular academic programs. "There is always this question of enrichment and then the question with enrichment is whether or not it is part of the (state funded) program or not," he explained. As did other participants, he draws property-wealthy districts and opponents of increased funding into the discussion:

> Some people, just because they have the additional dollars offer the additional experiences for students. As I think about the state (finance system) being a state education system (for all districts) and offering a comprehensive curriculum then in my mind that enrichment is not something that is optional. I think that if school districts are to provide that (enrichment programs) then we all ought to provide that. I don't think it should be only be for those that can afford to provide it.

Manuel Lira addresses his district's experience with meeting basic district operations:

> The taxes that are raised locally are just basically enough to pay for the maintenance and operations of the district – just barely. By that I mean, paying electricity, water, paying for maintenance services of buildings, cleaning of the buildings, the bus drivers that are needed, support staff that are needed, clerical staff. We just have enough money just to make ends meet. We don't have extra people. As a matter fact, probably, how should I say this, we are very productive and very efficient with the people we have. We make every person count. So money does make a difference. And with state monies of course you can offer so many more instructional materials for students, technology, computers, software

> programs, library books, extra teachers. Instead of having classrooms with thirty, thirty-two students per class, I wish we could have twenty-five students per class. It makes a difference in the quality of education.

Andres Rios honestly responds with a differing prideful perspective:

> I used to feel money didn't matter. I used to feel that the school can take care of itself. When I was a principal, I used to feel that and had to feel that whatever the kids weren't getting at home, we could provide at school. Then I realized that we couldn't provide it at school without money – one was tied to the other. So I've come to the perspective that money does matter and I'm very, very interested in marshalling or assisting in marshalling the effort to get this equity and adequacy issue resolved so that every kid gets to start, at least that we try to start every kid at the same starting point.

"Si yo lo tuviera, no te pidiera"

In discussing the "whether money matters" issue with the participants, the evidence is overwhelming that each of the education leaders resolutely believes increased funding improves achievement and provides opportunities for more rigorous academic programs. The conversation then shifted toward revenue sufficiency, specifically whether school districts currently have sufficient funds to provide the rigorous programs necessary for student success. I also inquire about the types of programs districts provide with the state funding they receive. Chuy Gutierrez found it amusing when I mentioned the publicly perceived unfairness of equalization programs. He wouldn't need funding if he had the ability to raise it locally, Gutierrez said laughingly:

Interviewer: And right now, you're just using state (equalized) funding to get by? Are you doing a lot of extra things or are you just providing basic programs?

Mr. Gutierrez: Mostly it's basic instruction. You can compare us with any of the rich districts or the wealthy districts, we grow more, at a faster rate than they do. *Nosotros* [Us], we grow almost two thousand students a year. So we are forever having to build schools. And this particular district that has thirty-five schools right now, five years ago, we had twenty schools. So we have built, in five years, we have built fifteen schools – two of them have been high schools, one middle school, and the rest of them elementary schools. If it were not for the IFA money, IFA money that our people fought for which allows us to be able to compete for monies because of your wealth, we would not be able to do it. Our share is a very small portion.

Interviewer: When I talk to superintendents from other parts of the state they ask why the majority of the IFA money is going to the Valley. They say that's not fair.

Mr. Gutierrez: (Laughter)

Interviewer: I hear that all the time.

Mr. Gutierrez: *Pos* [Well], why? Because you (already) have it (the local ability to raise funds). I mean, *si yo lo tuviera no te pidiera* [if I had it, I wouldn't be asking you for it]. Right? If I had the money to build schools I wouldn't be asking you for it.

The debate surrounding the regular academic program often negates the importance of facilities funding. However, Mr. Gutierrez cannot serve the needs of his growing

community with additional buildings. Henry Tamez introduces teacher shortages as a fundamental problem difficult to address with current funding levels. He barely reaches a level of sufficiency and his district is only able to provide "very basic, I can tell you, very basic" academic program with their state funds. Mr. Tamez is forced to "pay a professor from TSTC (Texas State Technical College is located in Harlingen, Texas) to come in and have an Advanced Geometry at the high school and a Physics" because finding quality teachers are a major challenge for his district. Mr. Tamez continues:

> *Pero le pago* [But I pay him], I think I'm just a little bit above what they pay at TSTC, but that's the only I thing I can tell you that I'm adding at the high school. Everything else is basic. Now, in accountability sense, I'm dealing well. We're in the 90s. I think we're academically doing well. *Pero allí para* [But right there it stops], you know. If you believe that the testing is all what education should be, it's wrong. Education should go beyond. *Este, n'hombre si ahorita* [Ah, no right now] if I want anything at the high school I have to do a barbeque fundraiser. That's where we're at. We thought twice about the $900 for the support of the Alvarado (plaintiffs). To think twice about $900 you know? To join that?

The accountability system serves as an indicator of success for both Mr. Gutierrez and Mr. Tamez. Both cite their respective district's performance on the high-stakes testing system as proof that despite the insufficiency of funding, their schools perform well. Mr. Tamez reiterates that education should not only be measured by performance on standardized tests. Finally, he describes how little discretionary funding the district has at its disposal, so that a mere $900 (a nominal fee to join the current West Orange-Cove

ISD school finance court case as Alvarado Plaintiff Intervenors) has to be carefully scrutinized due to his district's tight budget.

Both Mr. Tamez and Mr. Lira cite instances in which property-wealthy school district officials and legislative representatives ignore the basic needs of their districts. With angst rising, Mr. Tamez states:

> It's not adequate. They're not meeting their adequacy. *Y de hay salió un sonso chingando y dijo* [And at a statewide meeting some dumbass came out and said], "Let me, let us in the wealthy schools pilot the programs and let you know if it works or not." You know, what an insult. We said, "Hey, why don't you let us pilot and tell you if it works or not?"

Mr. Tamez is well aware that legislative appropriations decisions to fund EDA rather than IFA benefits wealthier districts. He points to property-districts' ability to not only access funding for debt and facilities but also describes the condescending manner with which the legislature considers the poor districts predicament by way of legislative decision-making. Mr. Tamez explains:

> And you know Enrique when the state takes $50 million and they give it as money for EDA, they're helping the rich districts. They can get the Freshman Grants. They get all these other (types of discretionary funding), *es pa ellos* [it was designed to help them]. It's a way of redirecting the efforts, the IFA and EDA. "*No se preocupen*. [You poor districts in the Valley don't worry.] You're still gonna get the help." I don't have, you know, a grant writer is chapter 1 in Migrant. Once in a while *nos juntamos todos* [we all get together] and we write a

grant. *Ellos, n'hombre* [Them, no way man], they've got grant writers up the, you know. You can sense the frustration.

In the same manner that Mr. Tamez questions the motives of leaders and underlying purposes of certain grant and funding programs, Manuel Lira offers a critique and challenge to wealthy school district and political leaders:

Mr. Lira: We tell the legislators from Plano, "Why don't you come here to South Texas to see what we have to work with? And you tell us if it's equitable or not?"

Interviewer: Have they come down here at all?

Mr. Lira: They did about three years ago. They came to look at Brownsville's schools and I think they went to look at Pharr-San Juan-Alamo's schools and McAllen schools. When you see at a high school twenty portable buildings, I want to go to Plano to see if they have twenty portable buildings out there at a high school. You don't see those things. And you know, cold weather, when it's raining, they don't have the same conditions… I mean, in some of the schools in Plano, they have indoor swimming pools. I would never dream of even considering indoor swimming pools. Our school district doesn't even have an auditorium. Our high school is lacking a fine arts (program). We don't have a classroom for choir. I don't have a band hall for our band.

Interviewer: Where do your students have band class or practice?

Mr. Lira: In the classrooms. We have a cafetorium, I mean, it's really a cafeteria but it's really not set up for a one act play, for drama. It's just for school presentations, award assembly programs. It's not set up. We don't have that kind

of money to have an auditorium or a band hall or a choir room or a stage band. We don't have a fine arts department at all. I wish we could have those facilities. We're working for it, we just don't have the money for that.

It being the beginning of the playoff football season in football-crazed Texas, I decided to ask why his school district does not have a football program.

Interviewer: Is that one of the reasons you haven't had football either?

Mr. Lira: We started football this year. This is the first year. We started it at the junior high. But for many years, one of the reasons that we hadn't had football was because of the expense. However, we're a growing 3A. We're the second largest 3A school district here in the Valley and with no football team. And we don't have a football team at the high school. We're doing it gradually because we can't afford it. I put in $50,000 for junior high football, $50,000. I mean I think that $50,000 would be (a sufficient amount to start a program), but it's nothing. All it did was just buy uniforms and helmets. We don't even have a practice field for them. I'm working on a practice field but that's for next year.

Mr. Lira is optimistic about meeting the needs of his growing student population. They have participated in the IFA facilities funding program in the past and have recently passed another bond election – contingent on state funding, of course. I ask once again if the funds provided by the state are sufficient to meeting his district's needs.

Mr. Lira: We're just making ends meet. That's it. We don't have any luxuries. We're able to buy two school buses a year. I wish I could order three. I wish I could give staff better raises than we're doing.

Interviewer: What percentage increase did you give?

Mr. Lira: We gave them $1,100. That's all we could afford. And one of the things that we look at, we try to take care of people first because people are what produce achievement. And we don't want to lose our staff members that we take years in training to surrounding school districts. So, we just make ends meet. That's it. We're growing and I don't know what we are going to do if IFA or EDA doesn't come around. We'll be in a bind. I'm very concerned about that. Instructionally, we do with what we got. We're behind on our library books. You have to have so many books for child. We're not up to that count. We don't have a fine arts feeder program at the junior high or the high school. We don't because we don't have the facilities for it. We're just barely keeping up, just having enough classrooms.

Interviewer: How often do you hear from parents about that? That they want more music or fine arts?

Mr. Lira: All the time. We don't have a band at the high school but we have a mariachi. So that's the consolation. We don't have a choir because we don't have the facilities but we have a (Mexican) folklorico group. That takes its place. They dance in a classroom. So that's what we do. Do the students want to have a marching band? Yes. Would they like to have a stage band? Yes. Can we afford it? No. (Laughter) When you're limited, you're limited.

Defining a Body, Mind and Spirit Approach

The conservative movement to limit state funding to core programs directly contradicts the statements made by participants regarding the need for local enrichment. Rather, they attempt to find ways to curtail the amount of "government" spending on

programs outside the tested subjects. In an editorial press release published by the Texas Public Policy Foundation,[44] Vedder and Hall (2004b) explain, "Besides the core curriculum, there are other subjects of value, but that are not necessarily universally vital." They give the example of the study of French that goes "beyond the core curriculum" and advocate expanding the notion of students and a parent incurring "at least part of the cost of this (type of) 'investment'" as is done at the university level. The TEC defines local enrichment as any program or service provided in addition to the regular academic program funded in Tier I. To the participants in this study, they understand "regular" academic program as one measured by the state accountability system and the performance of their students on high-stakes testing. Enrichment programs are not "measured" by the state's testing regime. In his description of his district's inability to create a marching or stage band program, Mr. Lira is implicitly making the argument that local enrichment is a necessary component of the basic educational program. Dr. Joe Treviño explicitly states his definition of education in the following way:

> I'm always reminded of the YMCA, you know, body, mind and spirit… yes we have to develop the mind, but you also have to develop the spirit in the people and you have to develop the body. And so you've got to have that balanced approach to education. And so in my mind, fine arts is important, in my mind, the athletic program is important. You know, I've got three schools in the playoffs and we're

[44] The Texas Public Policy Foundation is a conservative, non-profit organization that is guided by "the core principles of limited government, free enterprise, private property rights and individual responsibility." They issue reports and studies on issues such as school finance policy, charter schooling and vouchers. Among their biggest contributors is James Leininger, a millionaire who has advocated for a voucher program in Texas by funding the first voucher program in the San Antonio's Edgewood ISD.

> going to send buses and people over to Laredo. And we're going to send another bus over to San Antonio. I think that's important. We've got no pass/no play, it motivates kids to do stay in school. There are a lot of benefits that we get from that extracurricular participation, the bands, the choir, the drill team, all of that, I think, should be part of the education that we provide our students. I think some people would say no, we should provide that at the state expense…Well, then what happens to all those of us who can't provide it locally as enrichment? That's going to be inequitable if one were to define a lower level of adequacy as just the basic core curriculum. So that's a fear that I have. I'd rather take the higher definition of educating the whole child, with a balanced approach, where it's not just the mind, but the body and spirit as well.

Henry Tamez also mentions band as an important aspect to academic enrichment and explains how funding for extracurricular activities is raised. Mr. Tamez states:

> Band wants a trip to Dallas. The cheerleaders want a trip here to compete. We can't. Bake sales, car washes, that's all you do. That's how to get over to Dallas, that's how they get to Houston, that's how they get to San Antonio. I probably buy more tickets in this office, I probably spend thirty, forty bucks a day, on average, to help support extracurricular activities for the high school. And that's a fact. That's a fact.

He strongly affirms Dr. Treviño's contention that the state has the responsibility of providing for more than the regular academic program. He states, "Educating the kids in the state is a state responsibility – bottom line. I think all kids throughout the state should be given the same equitable right to the same funding for everything." He includes local

enrichment programs as part of the state's responsibility and provides examples of courses and programs that he believes are important for the education of his students. Contrary to Mr. Lira, his district is able to provide a marching band while not being able to afford a mariachi band.

Mr. Tamez: Sure, I'd like a swimming program. I don't have the money. Sure I'd like to teach French. I'd like to have a concert band. I'd like to have – and I don't.

Interviewer: You just have a marching band?

Mr. Tamez: I just have a marching band. We compete like all typical bands in South Texas with that marching band and that's it. The extracurricular things like the mariachi band, *yo no tengo* [I don't have the funding]. I don't have the money. I've been requested a mariachi band, for kids to get involved with that, *no tengo dinero* [I don't have money]. It calls for an extracurricular teacher and I don't have it. *Le digo al* [I tell the] band director, "Look, *baja la mano* [put your hand down]." You're going to go with at least $40,000. That's just for the teacher. And then uniforms, instruments *y todo* [and everything], another $60,000. *No lo tengo*. [I don't have it.] *Y de hay, el viaje* [And from there, the cost of making the trip], you know. So no, we just do without it.

Interviewer: But you believe that those kinds of things would add to their educational experience?

Mr. Tamez: Oh, oh yeah. You know, to go into a high school and see a diverse curriculum is probably, is important for kids. If we want kids to compete in the real world you need to have a curriculum that kids can choose versus a track you know they are going to go into regardless. All we want is some leeway with some

extras. If we can do something, if we're trying to meet the accountability requirements *del estado* [of the state] with what we get, why can't Glen Rose? You know, why can't, it's just inexplicable?

Expenses that most would consider as part of the basic program are mentioned again by Andres Rios. His district is another of the fast-growing, border districts attempting to keep pace with the increased enrollment. He provides a recent local bond election as example of insufficiency and the "bare-bones" nature of projects. A description of local enrichment in terms of fine arts facilities is provided.

Mr. Rios: Let me give you an example (of local enrichment). We're building a high school for 2,400 (students) for $28.9 million, paying $71 a square foot (for construction). Weatherford (a wealthier school district in the Dallas-Forth Worth area) built one for 2,000 (students), they paid $48 million. Northside School District (in San Antonio), $49 million for 2,500 (students). $52 million for a school in Northeast, San Antonio, 2,500 (students) at $122 per square foot. We're paying $100 (a square foot for construction). Now, these folks are putting in auditoriums. We're not putting in an auditorium. Swimming pools in many cases, two gyms and then a drill team gym. I mean, I've seen some of these facilities. They're fantastic. Ours are bare-bone – classrooms, labs, yada, yada, yada, no auditorium. We've cut down all the big common things that are "wasteful" so that we add value to our buildings. You know, and we're going to build a high school for 2,400 (students) for $29 million, compared to all these that run, it's pretty damn cheap compared to what they're doing.

Interviewer: Should that be part of the academic program where you have extra-curricular activities? Does athletics, drill team, band, choir, add to the education of the children?

Mr. Rios: Yeah, I think that they need to, again, to an equitable level, do some support for the extra-curriculars. You know, they're going to take care of, I mean Highland Park would die without football and some of the other Chapter 41 school districts, you know Katy's (in the Houston region) been the state champ a couple of years running. I think the affective areas need to be addressed.

The areas Mr. Rios terms "affective" are also necessary according to Manuel Lira. His district concentrates "on the core areas as required by the testing system" prior to spending on local enrichment areas because that "is what you are judged on." Mr. Lira sympathizes with the wealthier districts by stating:

> One of the things that people who have money say is that other things don't matter. It's because they are able to offer all the enrichment programs. They have this mentality that those of us in South Texas that are parents are not as demanding as they are. And therefore, we really don't need to have any of those enrichment programs. So, when they talk about, you know, go ahead and have this basic deal here, but allow us to have local enrichment well, that's great, for them, but for us there is no way it would be equitable. Those districts, for example, get zero money from the state or get send some to the state, on the other hand we depend on state funding. Because without state funding there is nothing we can do. And so, yeah, when you look at all of those, you have to be able to

look at that. You have to look at all your enrichment programs you offer whether it is band or art or FFA (Future Farmer's of America) or homemaking or athletics.

When asked if art, music, athletics or other extracurricular activities are essential to the schooling process and should be part of basic state funding formulas, Mr. Lira responds:

> Well, Enrique, you have to listen carefully. They are saying that it is not important to this part of the state, but it is very important for their part of the state. The hidden message is there, that you don't need it, you don't need to do fine arts. And yet, everywhere you read and you look at research it says that in order to have a quality education you've got include the fine arts, you've got include what we call enrichment, what the state is calling enrichment which is anything outside the core.

As Dr. Treviño succinctly described his educational philosophy of body, mind and spirit, Hector Sobrevilla concretely argued for additional state funding of extracurricular and enrichment programs. He cited research showing how funding of enrichment programs benefits student performance without mentioning the state's rigid accountability system as a primary contributing factor, then elaborates on his response by providing monetary shortfalls that prevent him from implementing a much-needed fine arts program at his elementary campuses.

> **Mr. Sobrevilla:** Enrichment will be like let's say additional programs, like fine arts or football or whatever else, extracurricular activities. Like right now, all the research says that we should have music or fine arts in our district and we have at the secondary but we don't have any at the elementary. I mean, think about this, I have twelve elementary campuses, twelve teachers at the beginning $30,000,

that's $400,000. Where am I going to get $400,000? But to me that's like enrichment. We need it but I would have to come up with that money.

Interviewer: Do you think the state should be paying for that? Should that be part of the regular program?

Mr. Sobrevilla: The thing is with what we have now, we can't pay it. We can't afford it. It would be good, *pero* [but], you multiply it by twelve and that's $400,000.

Surviving the Onslaught of "Reform"

In March 2004, the Texas Legislature's Joint Select Committee on Public School Finance released its final recommendations for reforming Texas' school finance system.[45] In the report, co-chairs Senator Florence Shapiro and Representative Kent Grusendorf (2004) conclude that the goals of a new school finance system should be to "drive student success through the efficient use of resources and innovative use of funds" (pg. 2), "eliminate" the system of recapture or redistribution (pg. 3), and "provide for ***meaningful*** (emphasis added) local enrichment with voter approval for revenue increases," (pg. 3). Although the report does not expand on the committee's definition of "meaningful" enrichment, a review of its input (funding)-output (test scores) methodology provides a glimpse into the narrow strategy for funding proposed by legislative leaders. Additionally, the researchers state that "there appears to be a fundamental economic relationship among input prices, educational outcomes and cost in Texas public schools"

[45] All but four of the fifteen member committee recommended the reforms. Noticeably, the only four representatives of color on the committee refused to sign the document. They included three Mexican American representatives from South Texas, Senator Eddie Lucio of Brownsville, Senator Leticia Van de Putte of San Antonio, Representative Vilma Luna of Corpus Christi and the only African American representative, Representative Ron Wilson from Houston.

however they then find that the "average minimum funding level per pupil of meeting state performance standards is estimated to be between $6,172 and $6,271 (in 2004 dollars), which is slightly lower than the current average budgeted expenditure of $6,503," (pg. 32). Furthermore, depending testing changes, performance measure modifications and inflation, "some Texas school districts will require additional annual funding of between $226M and $408M." As Texas Legislature prepares for the elimination of the current school finance system of equalization, it leans toward a lower cost-per-pupil, "adequate" level of funding. It appears to allow for "meaningful" local enrichment as deemed necessary by local "voter approval." With this as a background, I asked the participants how their district would fare without their current level of funding from the equalized funding system.

Impact of Equalization Elimination

As demonstrated in this chapter's school finance analysis subsection, school districts in the Rio Grande Valley region of the state would be adversely affected by a reduction or elimination of state funding. Each superintendent articulated the impact such a cut would have on their individual districts. Hector Sobrevilla, the leader of one of the poorest district in the state, stated it most simply: "For every million (we fail to raise with our local tax base), we lose seven (from the state)." In other words, they would lose about 80% of their funding if state equalized funds were eliminated. He explains how teachers' salaries make up the majority of his budget and reducing funding would handicap his district further. He states, "If we don't have a weighted system there is no way we can operate. There is no way we could pay above base (for teachers' salaries) from the state level. There is no way we could compete with anybody."

Other superintendents also emphasized the prominence that teachers' salaries play in operational budgets. In most cases, if funding were reduced or eliminated, teacher positions would be the first line item cut their local budget. Per pupil ratios would increase, districts would not be able to compete for more-experienced, higher- qualified teachers and academic programs would suffer. Chuy Gutierrez explained how his district would be affected.

> **Interviewer:** If the equalized funding went away, would you be able to operate? How would it affect your academic program? Would you have to cut teachers?
>
> **Mr. Gutierrez:** Of course. We won't have enough to buy the supplemental programs as far as materials and/or teachers that come with it. We would have to increase our pupil-teacher ratio. You can go on and on, of course that's going to hurt. We're scared.
>
> **Interviewer:** So locally, you can't provide the basics with your local tax base?
>
> **Mr. Gutierrez:** And that's another thing, you see, when they devised the system of finance they give you a certain cap to where you can go as far as taxing your population, your constituents here. We have been at that max for over ten years. My district has been taxing the $1.50 for over ten years to maximize our state funding. I mean, we are taxing our people to death – our poor people, may I add, to death. And these guys are going like, they live more comfortable over there because they don't have to go to that extreme and yet produce a lot more money locally than we do…We have to go, besides our taxing stuff, we have to go to knock on doors. And we have a tremendous system support from our business people. And those people, the banks, the large grocers, the department stores, the

attorneys, the architects, construction people, etcetera, you know, they all got together and they pitched in a share to educate our kids. So we have, I think we beat a lot of people as far as scholarships are concerned also because we have tremendous support. But you know, that's not all. We need our share, our equal share of the state funding to be able to compete.

With the current amount of funding received by José Ybarra's district, they are "having a hard time being able offer the programs that we believe are important for our kids." The state of flux districts operate under is compounded by the uncertainty of a proposed special session on school finance. With the current law and the recommendations from the select committee meetings, Mr. Ybarra realizes that "there are no, any kind, of resources for next year." His predicament is dissimilar from other districts in the Valley because student enrollment is decreasing while his property value is increasing, becoming "wealthier" in the process. I attempt to gauge how much the outright elimination of the equalized system would affect his district.

Interviewer: How much money do you receive from the state? I was just wondering what would happen if that went away or if the state funding went away tomorrow?

Mr. Ybarra: Oh, it would be devastating. We get from the overall budget about $14.5 million, about 16% of that is federal and then we get local $2 million out of that. And so the bulk of the money comes from the state.

Interviewer: So you'd be talking about cutting people? Programs?

Mr. Ybarra: Yes sir. Yes sir. This year, in order for us to give a minimum 2% raise, we cut five staff members across the district, professional staff members

because non-professional, I mean we've been cutting them as well, but it doesn't make the impact like the professional does.

Both Manuel Lira and Henry Tamez would also have to cut positions. Mr. Lira's district garners "probably 10% local, 70% state and about 20% federal" and if funding were eliminated, "It would make a big impact on the district, on the services that we can provide for our students." Specifically, "About 70% our budget is personnel and even right now I can tell you that we are very efficient," however people would be the first to be cut with less funding. Henry Tamez' district is "at eighty-seven, ninety-one" percent state funding and "if that went away I don't know where the money would come, we can't do it locally." When pressed on whether any portion of his budget could be saved from a reduction in state funding, he answers:

Interviewer: Not even for the basics?

Mr. Tamez: Not even for the basics. No. I've got one little café that opens for breakfast and lunch and that's it. I've got a store across the street. They don't compete with HEB or Kroger (regional supermarket chains) or anything like that. That's it. That's my tax base. I don't have anything. If it wasn't right now for assistance in IFA and EDA we'd be under. You know, we were going under three years ago. I just noticed that the formulas weren't quite working for us, you know.

Interviewer: Before the facilities bonds you were able to sell, what was happening here in terms of meeting your facilities needs?

Mr. Tamez: *Nada* [Nothing].

Interviewer: You had old facilities?

> **Mr. Tamez:** *N'hombe* [No way, man]. That facility across the street is a 1926 building. It's used today. The old high school is now our junior high. Before IFA and EDA came in, the voters in here said, "Hey, we're going to support a new high school." Luckily EDA came in *pero* [but], the patrons took it upon themselves to have what they have. *Este* [Ah], it's hard for us to do anything (solely on local funds).

Joe Treviño's sentiments about the elimination of equalization mirror the other superintendents. If equalized school funding is eliminated "then we get further behind than where we are right now." As do the others, they spend on the basics. Dr. Treviño states, "We've got to spend it on the basics. And I say the basics in that yes, teachers, yes, instruction, and then some other programs suffer." Budget cuts have occurred in the recent past with over thirty central office staff members cut from the payroll in order to pay for a slight increase in teachers' salaries. He explains:

> So, we cut central office support for the schools. We changed how we are doing the programming at the high school, went away from block scheduling to traditional scheduling. That saved us a lot of teachers. So if we were to lose dollars and/or if we were not able to get additional resources, we just cut. And yes, we have to provide teachers, yes, we have to provide the core curriculum but a lot of other things go away. We won't spend as much on maintenance and upkeep. We may cut custodial staff. We may need to tighten up on transportation, just a number of things. Our facilities will continue to suffer. We have a lot of older schools...And so then you have unequal facilities. Where other districts who either have the means through their own tax base and/or who have

been able to catch up with the previous state assistance, we just have not managed to do that and that's a big problem in our district.

Striving for Efficiency in the Era of "Accountability"

Like the terms "adequacy," "substantially equal," and the recently published "meaningful local enrichment," the concept of efficiency has become a rallying cry for those wanting to dismantle the school finance system. The first three Edgewood court cases defined efficiency as the ability for all districts to have equal access to equal funding. After Edgewood IV, the definition shifted to a more "economic" definition, where effectiveness and efficiency is measured by inputs and outputs. The select committee's findings stressing the relationship between funding and student performance is not lost on the participants. When discussing inefficiencies in their organizations, the superintendents address how they respond to political leaders and community activists concerns of school district waste. Not surprisingly, the participants defended their managerial acumen. They pinpointed ways they have saved district money by streamlining operations. However, they sincerely agreed that insufficient funding hampered student success. Andres Rios responded:

> You know, we've talked about that a lot and I don't know where I could cut. In the last year and eight months that I've been here, we've cut everywhere. I came in, I cut 10% from every department. I just came in, didn't know anybody and I said, "The first thing I need to tell you all is that I need 10% out of your budgets." They looked at me like I was crazy and I said, "No. We need 10% out of your budget so that we can balance this budget." Then I went to the campuses and I said I need 10% out of your non-instructional budget…I tightened up schedules. I

> increased pupil-teacher ratios from 5th through 12th grades, which I thought I would never do, but I did. I cut two of the teams upstairs, support teams, blended from four to two's, saved half a million dollars. We put in a new middle school schedule to increase the contact time with the middle school teachers, in other words, they had to pick up another period. That saved us sixteen teaching positions last spring. We've tightened up bus runs so that we don't have buses running like El Metro (the city bus service), picking up kids every so often for athletics. Every where we turn, we're trying to be as lean as we can. I'm operating a 32,000 member school district with a staff for curriculum, instruction and staff development that was here when it was not so big. They're sucking air. My HR (human resources) department, I have to keep going over there to see if they are alive every week. I've run out of Knute Rockne (legendary Notre Dame University football couch) pep talks, you know, but that's kind of where we are.

Henry Tamez forcefully defends how he allocates his district's precious dollars:

> No, there's no waste *aquí* [here]. We look at every penny. We look at every dollar just to scrape by. There's no waste anywhere. Anyone who says that there's waste at the poor schools he just doesn't know, he hasn't been here. We limit travel for staff. We go to conferences that are important just to keep up with the information world. Ah, no. We share rooms. When I send people to Austin (for conferences or training), there's a limit of four per car. That's just for professional training. I rely on the services of the service center. I don't have external consultants come in. I just rely purely on Region One. *Este, ahorita* [Ah, right now] the training that you see in that little room is one of our staff people. I use teachers to train. I send them

> to the training of trainers, but no, I don't pay for consultants from the outside to come in with any new ideas. It's all within the school.

José Ybarra and Joe Treviño have a broader understanding of the arguments concerning efficiency. They argue that the $1.50 tax rate that limits districts from raising more state and local funds also requires districts to cut inefficient programs, staff and processes. Mr. Ybarra states:

> I don't believe that there is a school system that wastes money for the sake of wasting money. I believe that we do everything possible in order for us to make sure that we utilize and pool what we do have as much as we can. Take my district and 500 districts that have been at a $1.50 the last three years, that means that there is no way that we can go to the board to ask for a little more revenue. So we have to be able to look at everything and we have to be able to find the best way to be able to pool that dollar.

The legislative leadership fondly pushed for a simplified school finance system – one that they believe will promote efficiency. The recently released select committee report (Shapiro & Grusendorf, 2004), in fact, states as one of its goals, the need to "create a simplified school finance and tax system that people can understand," (pg. 2). Mr. Ybarra is "concerned with Grussendorf's deal" and finds that his call for a simple system will disadvantage poor districts. He continues:

> Well, school finance is not a simple issue. If you want to keep it simple then you are saying that every child takes the same amount of money to educate. Every child regardless of what their condition is, whether it is special ed, whether it's bilingual, whether it is career and technology, you know, any of those. And so

> basically what they are saying that there is no need for weights because that complicates everything…My definition of simple might be if I need more help then you are going to give me more help. That is simple to me.

Dr. Joe Treviño recognizes insufficient funding as the main cause of ineffectively meeting achievement results. He questions the commitment of legislators to sufficiently fund districts that have reached the $1.50 tax rate limit and states:

> I don't think there is enough money in the system…A number of us, and it doesn't matter whether you are rich or whether you're poor, I think most of us have hit the ceiling (i.e. the $1.50 tax rate limit) of the available dollars that are out there…There isn't enough money in the system. If the Legislature, the state leaders are saying that…we're not going to give any new dollars then what they are saying is well, we want to freeze teacher salaries, we want to freeze everything where we are and school districts you're kind of on your own. We, the state, are not going to continue to assist you. Is there a waste of dollars? I'm sure there are always some minor improvements that can be made, but I think they are minor. Can we squeeze 3% or 5% out of the system? I think, yes. Now, I don't know that we can gain significant dollars to be able to do what we need to over the next several years. That's the reason the Legislature needs to come up with a different way of funding school districts.

The two poorest districts, Azúcar ISD and Snowbird ISD have little room to be inefficient. Both superintendents find inefficiency to be a major issue in their districts' operations. Hector Sobrevilla states, "They keep saying there is a lot of waste, however

there is only so many administrative positions one can cut before the regular academic program is affected. Mr. Sobrevilla further elaborates:

> I'm down to two assistant superintendents. One is curriculum and one is on the business side. It's very hard. Our school district, I think, is the eighth largest school district in the state. But we are the eleventh (in terms of wealth) at the bottom. I mean, eleventh wealth-wise. We are number eleven out of 1,034. So, you know, it's a big burden.

Manuel Lira once again stresses that inefficiency is not an option with the limited discretionary funding the his district has. They garner, "I'm saying about 70% (from the state) and if we didn't have the 70% we would be nowhere near where we are now in regards to the quality of the instructional programs that we have and even then, we're lacking." As Mr. Lira states, they could use "additional funding for instructional programs, for technology, for software, for training." Furthermore, he correlates student achievement directly to the quality of teacher training and professional development opportunities afforded to his teachers. Mr. Lira states:

> I think the success of a school district is really its people and the more educated staff you have, the better quality of programs that you have. And when you limit it then the effort and the funds that you have is going to determine the success of your educational programs. If this is all the money that we have for staff development then we have to make sure that every staff development counts and that it is really focused on what are needs are because we don't have room to waste any of the funding. That is how we become efficient.

All the educational leaders in this study are cognizant of the perception many in legislative circles have regarding waste in public schools. They vigorously defend their decision-making and expertise in managing their schools, however they also "draw a line in the sand" by relying on the accountability system as a measure of their efficiency. Some even ask the legislature to "put more teeth into accountability." Richard Muñoz best exemplifies this entrenched top-down management mentality. When asked how he responds to legislators who question districts about efficiency issues, he points to an upcoming legislative hearing in which he will testify about the crippling nature of some of the legislature's appropriations decisions.

> **Mr. Muñoz:** I never said too much about it because at the same time they were putting more money into the formulas. This year they put money in targeted money and nothing in the formulas. So I said we need to get back, if there is money available, put it all in the formulas. Put it in the formulas, we're going to get more of it because we're poorer. And the kids that need more money, we're going to get more for them. But they don't want to do that. See, they want to put it over here (in block grants or unequalized formulas). I'm going to attack that under the auspices of local control saying, "You put the money in the formulas. Let the elected local boards and the superintendents decide. Then, hold us accountable. If the accountability system is not enough, then dammit, put more teeth into it. Put more teeth into it. But let us make the decision. Right now, you're telling us how to spend the money more and more every year but yet you're still holding us accountable for the things, you know – no, no. Let us make the decision and then

dammit, make us deliver. And if we don't deliver, then we suffer the consequences.

Interviewer: So when legislator says, "Well, we've put too much money into the system already, there's just too much waste." Your response is, "You're taking too much local control away from us"?

Mr. Muñoz: And still holding us accountable. My answer is put more teeth into the accountability system. If you are saying that we're not spending enough, I don't have a problem with that. Tell us, "You must spend 70% on instruction." I don't have a problem with that.

"Robin Hood": Hero, Thief or Accessory

None of the superintendent participants spoke critically of the Texas accountability system and its high-stakes nature. Rather, they boldly claimed their students could "succeed" if given the opportunities. Texas-style accountability was embraced, yet each participant simultaneously informed me that money does matter in the success of their students; current funding is insufficient to provide a basic academic program; and the state's definition of "education" as solely based on reading, writing and arithmetic test scorers was too narrow. Each participant also believes their district can not survive without equalized funding, and inefficiency is not an issue in their district. In the meantime, opponents in the legislature, media, and within interest groups (Shapiro & Grusendorf, 2004; Vedder & Hall, 2004a, 2004b) desire to dismantle the equalized system known as "Robin Hood." The following section of the chapter describes how, given the statements provided in the previous sections, district superintendents consider and discourse about the so-called "Robin Hood" system of school finance.

Improvement from the "Bad Ole' Days"

All of my participants have worked in education for over twenty years. Half have been involved with the struggle for equity and fairness in school funding since the Edgewood cases. All attended inequitable and segregated schools. Therefore, I first wanted to ask if change from the "bad ole' days" had really occurred. The participant group felt that things had improved but that more was needed to reach the level that the Edgewood cases had mandated. Henry Tamez has seen the finance system improve since the time he attended school as a migrant student.

> I think the system after the (Edgewood I) Supreme Court ruling has been a lot better. I think the "Robin Hood" has been a, has helped the poor school districts bring up some equity. I've been in education, in administration long enough to where I know the days of real poor. I think the Equity Center and the Edgewood case has really brought around a system where it's quite more equitable than it was before. But I don't think it's anywhere where it's supposed to. You know, they're not complying with the Edgewood case at all. If the state can support and do away with recapture and still support us at the level we're at today – I don't foresee it, I don't think there's that money in the state anywhere.

Although Hector Sobrevilla has already stated that what his district receives is insufficient for operating the type of program he believes is necessary, he is appreciative for what his district receives. Mr. Sobrevilla states:

> It's better than it's been before. Before "Robin Hood" we couldn't even buy computers. Now, at least, there is several avenues that we can go through. But before, I mean, districts that had the money were able to buy all that stuff.

Manuel Lira is also grateful for the additional state funding and believes that the financial health of his district has improved due in large part to it. Mr. Lira mentions his district's performance on state accountability tests as evidence of what the additional funding has helped bring about.

Interviewer: You've been education for several years, do you think that funding and equity has gotten better? Or has it the same?

Mr. Lira: I'm going to tell you that it has gotten better. I remember, I started being a superintendent ten years ago, the first year I was superintendent here I had to borrow money twice to meet payroll. Just to get by. Just to meet payroll. And at that time I believe that we were understaffed, at that time. So through the "Robin Hood" finance system and the adjusted allotments that are given to students we receive more funding and we were able to become more successful. I remember ten years ago we were just in the latter part of TEAMS (an early accountability system test known as the Texas Educational Assessment of Minimum Skills), our students' scores were in the teens, the twenties and thirties. So, we've come along way. And I want to tell you that funding had a big part of it. More staffing, better staff development, more instructional equipment, our facilities were run down. We had to do a lot remodeling in the building. Some of our buildings didn't have air conditioning. And so now at least we have air conditioning in all of our classrooms. We didn't have enough restroom facilities and now we do.

Interviewer: Just basic stuff?

Mr. Lira: Yes. No luxuries. You can go to any of our schools and you'll find a plain vanilla school – classrooms and office space, nothing fancy, just functional. We have to look at function over form.

Similar to Mr. Lira, Joe Treviño acknowledges the state's improved finance system and points directly to accountability as proof of success. Dr. Treviño is not critical of the $600 per student "gap" that remains present within rich and poor school districts. In fact, he hints that the "gap" is something that is acceptable by many fighting for equity and is thankful for the facilities funding that has been provided by the state. Dr. Treviño states:

> I think there have been a lot of positive changes. First of all, you go back twenty or thirty years and we did not have an equitable system. So I think there have been a lot of improvements made towards equity and yes some of us are somewhat satisfied at the $600 level difference per student. You know, the state didn't used to help with facilities and they now have assisted school districts with facilities. So I think there have been a lot of positive changes.

Dr. Treviño further links improvement of the school finance system to the accountability system instituted in the early 1980s. He explains how high expectations for all students have improved under the testing regime. Dr. Treviño states:

> You look at the testing, I mean, when I first started teaching we were doing TABS (Texas Assessment of Basic Skills). We went through TEAMS (Texas Educational Assessment of Minimum Skills). TAAS (Texas Assessment of Academic Skills) was very successful. I think we've made a lot of progress in becoming more successful with students except that as we've done that, the bar keeps being raised for us. What is the expectation nowadays? The expectation is

> that all kids graduate, that all kids go on to college. While back thirty years ago, that may have been a goal, but we weren't as successful. And then you look at the testing systems that we had and you know, TABS was a basic skills test. So I think we have evolved to a lot higher standard not only in what we are requiring kids to do but in addition to that, being accountable for 100% student success. So there have been a lot of positive things that have happened and I think nationally the state is recognized for being very progressive and doing the right kinds of things.

Multiple "Robin Hoods"

Opponents of the "Robin Hood" system of financing the schools have been winning the public relations battle. The issue has been framed as being unfair to districts having to "give their money" to poor districts. Because many more districts are approaching the $1.50 tax rate limit, their access to increased funding is further exacerbating their concerns of inadequate funding for their own programs. So, my next line of questioning revolved around the issue of political rhetoric and the framing of the "Robin Hood" system as inherently unfair. In my conversations with the participants is becomes clear that "Robin Hood" is thought of in multiple ways. Some consider the financing system necessary while others believe that it is unfair to "take their money." Andres Rios is one participant that seems to especially adhere to the latter sentiment. Mr. Rios believes that equity is necessary and calls for fair way to approach the variance in student home life, socioeconomic status and community wealth that a diverse group of students brings to the district, however he does not wish to "begrudge" school districts

that are wealthy. I probe him further on the whether he considers the current system just. Mr. Rios understands it in this manner:

> We ought to be able to provide the same basic programs (as Highland Park, a wealthy district in Dallas) and then if Highland Park, because I don't want to begrudge them their legacies, their family, work ethics and all that stuff, anymore than I would want somebody to take my money because I've worked hard to get to where I am just because they're poor. I want to make sure that we all have at least, let's say, top-of-the-line Ford or Chevrolet and then if they want to do something else and get a Cadillac or Lexus I can't do anything about that. I don't necessarily believe in "Robin Hood". I don't necessarily believe in robbing anybody. I think that at some point, and it's too simple, but I think at some point they just need to leave them alone and not give them anything and give the rest of the folks money. You know, I don't begrudge anybody what there community is worth. Like I said earlier, I live in a certain part of town that a lot of people probably say, "*Hay, mira, son los ricos*." [Oh, look, they're the rich people."] But, hell, I've worked my butt of getting to where I am. It's not *rico* [rich], but it's comfortable. I think that anybody, that we should not begrudge anybody those things. But, I need some help in getting some of these kids that are coming in at readiness levels below level, to give them a leg up so that they can find the starting point… Now, do I like taking from Highland Park? No. Do I want to be like Highland Park? Yes.

Mr. Rios' perception that the state is "robbing" from Highland Park ISD is problematic in that they continue to generate more combined funding than most other

districts in the state. They also benefit from the Highland Park Education Foundation, a nonprofit organization incorporated in 1984, created to assist the district "in maintaining the educational excellence that has been a community standard."[46] Others are also able to understand the predicament that districts like Highland Park ISD operate under. Joe Treviño responds in the following way when I ask how he responds when opponents frame the issue as "stealing from the rich to give to the poor":

> I think it depends on the perspective that one has. People being stolen from, they see it as bad. But on the other hand for a lot of us, "Robin Hood" was a good guy. He was giving to the poor and wanting to make sure that there was access to the resources.

The majority of participants however continue to state that additional funding needs to provide and that the struggle to reach an equitable system has still not been won. Chuy Gutierrez believes that "Robin Hood" has been characterized as a "bad guy" however he furiously defends the system, refusing to back down from the system that took over twenty years to build. I ask him if the system is "broken or outdated," to which he responds:

> More money needs to be put in. The so-called "Robin Hood" method is gotten a little bit closer to equity, that's all it did. It got a little bit closer to equity. The gap has gotten closer. It got to where we can reach the 80th, 85th percentile of equity. But it's not, we've been okay, if you will. But they want to put us back beyond or

[46] Information on the Highland Park ISD Education Foundation can be found at www.hpisd.org/contents.asp?s1=1&2=2&id=11&id2=71. The website in part states that "with the advent of legislation mandating that HPISD send more than 60% of its tax revenue to other Texas school communities, the Foundation's role and community support of the public schools have become critical elements…" Foundation funds are not part of the school finance formulas, thus districts are able to raise additional funding without the threat of recapture. The website states that it raised and provided $378,700 for scholarships and district support in 2000.

> lower than that 85% equity. And we're saying, "*Chingao* [Damn], what we have now is the step to where we wanted to get and now you're trying to bring us further down instead of trying to equalize it."

Henry Tamez also believes that a reversal of many years of struggle is being attempted by property-wealthy school districts and their supporters. He agrees that "giving it the 'Robin Hood' stereotype is probably misleading" and that the "money should all go the state and then from the state out to the schools." Mr. Tamez is not satisfied with the current system and does not yield on his assertion that "if you want to call that 'Robin Hood' fine but I think it's a way of educating the state's kids, it goes back to being a state responsibility."

While some participants empathize with wealthy-district sentiments, others continue to believe that money raised at the local level does not really belong to them. They hold the view that because it is the state's responsibility to educate all children and the entire benefits from the education of all children, that money raised, whether it is local or not, belongs to the state. José Ybarra is one participant that articulated this point. I ask him his opinion on the origination of the "Robin Hood" moniker and Mr. Ybarra responds:

> I don't know where that originated as far as, and I guess it's from the old story, right? But it's really not taking from anyone. I still believe that whatever resources we have, to some degree, they belong to the state. And so, it is the state's money. It's not my money. And part of the problem is that people are saying, well, our chamber of commerce went and did this and did this and did this, they brought this in and brought this in. Well, they are also brought it

> because it was beneficial to come to Texas, to come to this state. Whether they look at it in the Valley or the middle of the state or east or west, you know, that was a decision they made but they wanted to come to this state because it was beneficial to come to this state.

Manuel Lira reiterates that "somebody certainly invented that term" to frame it in a negative light. His micro-level understanding of "Robin Hood" informs his response to the question of the fairness of "stealing from the rich and giving to the poor." Mr. Lira states:

> Has it helped this school district? Yes. Where would we be without it? I don't know. But I will tell you we would not be where we are now. I do know that in the last few years this funding has helped this school district and I believe it needs to continue. I think that shortchanging school districts like Azúcar would not be equal or not equitable to other school districts in the state of Texas. Is it perfect? No. It's not perfect. But yet I look at other states and they also don't have perfect funding systems either. There will always be flaws. But what is in the best interest of all the children in the state of Texas? Not just a certain section or a certain part of the state.

Living with "Robin Hood" by Default

The multiple understandings of the "Robin Hood" system of finance complicate the public political and policy discourse one may use in an attempting to influence policy. These eight politically-active leaders have differing opinions on the meaning of fairness in the fight for equity. I introduced a more critical understanding of the school finance system and asked the participants if their districts would ever be able to achieve revenue

sufficiency in a system that stresses property value and accountability measures so much. I ask whether given that they are by most accounts the poorest of the state's districts and overly reliant on state funding, can they ever not be at a disadvantage in the "Robin Hood" system of finance. Henry Tamez responds succinctly when I ask him directly about fairness.

> **Interviewer:** The current system is basically based on property values and ADA. Do you think that it's fair that property values hold such a great weight in determining funding?
>
> **Mr. Tamez:** It's not quite fair. My average home (in the district) is assessed at about $15,000 to $22,000. That home brings in an average of $80 to $90 on taxes. My (personal) home at Cimmaron (subdivision), at the country club in McAllen, I pay $6,000 a year – versus $90 for the average home *aquí* [here]…I'm not taxing no Dell, no Boeing, no Microsoft, no one. No it isn't fair. We're at $1.72 total, I & S and M & O, that isn't fair. The taxing structure in the state isn't fair.

Mr. Tamez is quick to bring the tax structure into the conversation – an issue that many in the STAS leadership did not want to address. He is more forthright in his implication that Republican leadership from North Texas is conspiring to disadvantage South Texas school districts. Mr. Tamez states:

> (Texas State Representative of Arlington) Grussendorf and those people, man, they were trying to screw the Valley (with the passage of bill eliminating "Robin Hood" without a replacement). I said (at a STAS organizational meeting), "*Nos íban a joder* [They were going to screw us]." You know, Glen Rose (ISD in the Dallas area) is spending what $120,000 per child, *y nosotros* [and us] we're

spending $2,000, $3,000 per kid. Man, Highland Park (ISD in Dallas area), the public raises money for school salaries, you know. *Yo* [Me], I can tell you *que nosotros tamos muy jodidos* [that we are really screwed]. You know by the time I hire a teacher I've looked at the budget over and over again. We got in the red just a little bit here, two or three years ago. We're back up, *pero, cabron* [but, damn], we're raising, we're selling barbeque plates to do this and that *y estos* [and these] guys, it's a different ballgame. I'm, we're educating, we're educating the kids of the state.

Mr. Tamez is dealing with a system that he is clearly frustrated with. He understands that a system that relies so heavily on property values can not benefit his district. His use of the example of differing housing values to communicate how powerless he feels under the current funding formulas. Conversely, José Ybarra is more satisfied with "Robin Hood" than Mr. Tamez. His view is not critical, rather he focuses on the improvements made since the adjudication of Edgewood I. He returns to his assertion that the mechanism for distributing funding is adequate but the amount of funding is not.

Interviewer: Is the current system fair? Is the amount of money enough to accomplish your goals?

Mr. Ybarra: I believe that the current system is a good system. I believe that it has the capabilities of providing the things that we need for the new challenges. But I also believe that it is functioning at a 90 or 95% maximum capacity because of the amount of money that has been put it. You put the right resources in there, wherever those resources are coming from, the system works. My biggest fear, Alemán, is that we are going to go over there (into a legislative session) and we're

going to get rid of this antiquated system that he calls it, and to come to a new system, that nobody knows what it is…

Interviewer: Do you think that the current system is antiquated though?

Mr. Ybarra: I don't think so. I think the resources that are put into the system are antiquated. I think that when you look at the constitution that says that it is the responsibility of the state to provide this and they are providing 42%, so how can they say that the state is doing their part? Yes, the taxpayers are overburdened. If there is something antiquated about the system it's allowing the property owners to pay for everything.

Hector Sobrevilla also states that the "Robin Hood" system has "been the fairest that we've had" but he also recognizes the inability of his district to raise funds locally. As stated previously, his district is among the poorest, has reached the $1.50 tax rate limit and has an increasing student enrollment. Mr. Sobrevilla distinguishes between the finance system and tax structure, as did Mr. Ybarra. His issue is also not with the distribution of funds but rather, the generation of revenue. He states:

I know they are talking about a state property tax at 75 cents but then the districts have a choice of raising the ten cents for enrichment. Well, I mean, the problem is again that nobody wants to pay taxes. And for us to go back to the voters and say, well, give us five cents for enrichment, I mean, they are not going to want to do that. We know it's not going to work. It's going to be very hard for us. I mean, the Richardson's (ISD in the Dallas area) and the Plano's (ISD in the Dallas area) of Texas, I mean, with not even a quarter of a penny they can raise that amount, but

we can't. We've got to go the full amount because we don't have any businesses to support it.

Later in our interview, Mr. Sobrevilla returns to the question on fairness. Where he earlier stated that the system "was the fairest we've had," he questions the trend toward eliminating funds and programs while the standards for "success" have become more stringent and punitive. He states:

> They are cutting millions of dollars into Title I. You know, they are cutting. They are setting ideals that we need to keep, that we need to have. We are performing at this level and if you don't, if your dropout rate is not at this point or you don't have qualified staff, you know, all these things, but yet there is no money to support that. Here we are just fighting to survive with what we have now and then at the state level they are saying, "Well, actually guys, we want you to have less." This is what they are telling us. We want you to survive with less but it's okay for us that have money to survive with more. We're doing you a favor because at least you have to certain point. But it's not a fair system.

Contrary to Mr. Sobrevilla, Joe Treviño chooses to first focus on the positive changes made by the equalized system rather than answering the question regarding fairness directly. He begins by stating how several state funding programs have benefited poor school districts and concludes his first response to the question by listing projects that have helped the Rio Grande Valley's economic and educational development. He states:

> The Equity Center would say that we need to be more equitable, and I agree with them I think we do need to be more equitable. Yes, I think the state has addressed

> the need for facilities. That still needs some tweaking and some fixing because that isn't equitable at this point. But they (the legislature) have come through and have provided some major funding for facilities and a lot of the Valley schools have taken advantage of it. You mentioned the medical school (and the fact that the Rio Grande Valley does not have a medical or law school despite its large population), and that's true, I think that historically the Valley did get shortchanged. But I think those things are coming. Harlingen has the beginnings, or the Valley has the beginnings of a medical school. The state needs to continue to invest in that. I was happy about the changes that were made at the higher ed level where there are dollars available for facilities and you see a lot of construction going on and you go to Edinburg, to UT (University of Texas)-Brownsville, to UT (University of Texas)-Corpus Christi and there is construction.

Dr. Treviño then decides to answer the original question regarding the school finance system's reliance on property value to calculate aid. He shifts his response slightly from his previous explanation of the improved state of funding opportunities. Dr. Treviño timidly acknowledges that majority-Mexican American and poor districts are disadvantaged by the historical over reliance on property values. He responds to whether a system based on property can ever be fair to South Texas schools by stating:

> I think the answer is no. I think a lot of us would say we are satisfied but know that there is still a bit of unfairness to it and I have two major things that I'll point to. One, the equity gap has been getting larger. I think back when the court decided that we had a constitutional system, it was at $600 and so that's where we

were then. And so we said okay, it's constitutional. And now that has grown to about $900 or about $1000 per student. You know, that's a big difference. And you say, well a $1000 per student. Take a classroom and take a school and see how many thousands of dollars that is. You know it's $22,000 a classroom if I just use a $1000. It's half a million dollars if I'm talking about a 500 student school. Never mind a high school, that would be a million and half difference in spending at a high school of 1,500. So it's a big difference and that's one of the unfair pieces to it. The other unfair piece that continues to exist in the system is how Chapter 41 districts are allowed to do bond issue with greater capacity than a poor school district. They don't have to wait for it. They get their money up front with their property values that they have. They are able to continue, I mean they have to pass their bond issue just the way we do, but what we have to do is pass the bond issue then hope there is some state assistance.

The participants of the study are not totally aligned in their understanding of whether "Robin Hood" is a hero, a thief or an accessory to a crime. They each realize that the system has improved since the "bad ole' days" of inequity, legal segregation and overt discrimination, but they fail to overtly implicate the taxing structure and the over reliance on property values as the main culprit to the constant disadvantages that they face via the school finance system. Moreover, strange justifications are used to rationalize the per pupil "gap" such as Dr. Treviño's point that "a lot of us would say we are satisfied but know that there is still a bit of unfairness to it." They have learned "to live with 'Robin Hood'" although their frustration and cognizance of the unfairness seeps through their discourse. In the high-stakes, political and policy-making process, the

organizational and individual disconnect exhibited by the STAS and district leaders could hinder and/or weaken their position within the school finance debate and political dynamic.

(Un)Critical Solutions

The STAS members and leaders realize how essential participation in the current school finance policy-making process is. The testimony they provide and solutions they propose and advocate for will influence the type of system that evolves over the next several years of legislation, litigation and advocacy. As outlined in previous subsections, the leaders embrace the importance of school funding, have organized in an effort to withstand and challenge the elimination of "Robin Hood" and have formulated practice-based opinions regarding the effectiveness of the system. In this subsection I challenge the participants on their conceptions of full equity, the adequate cost of education and the racism embedded within the school finance structure. What I find is an uncritical frame of analysis that threatens to derail their vital and well-meaning efforts to find solutions to this critical aspect of schooling and education policy.

Having recently retired after over thirty years of educational administration experience, Richard Muñoz commands respect and admiration from the other STAS members and participants of this study. In fact, one of the other participants remembers him as an influential high school teacher who challenged him to be a better student. Therefore, I look to Mr. Muñoz first as I begin to ask for the organization's proposals for improvement or strategies for protecting what has been the lifeblood of most STAS districts – the "Robin Hood" method of funding schools.

Interviewer: If "Robin Hood" went away tomorrow what would happen to STAS districts?

Mr. Muñoz: I don't have a problem with that. I have a problem only if they (the legislature) don't make it up.

Interviewer: If they don't give you something comparable?

Mr. Muñoz: Well, yeah. If they are going to take $2.5 billion, *mas o menos* [more or less], their estimate, that is $2.5 billion this biennium, over two years that is coming in under "Robin Hood." If you let that stay with the (property-rich) schools then you lost $2.5 billion, you've got to replace that. That plus the fact that I don't want Highland Park or Alamo Heights or Austin ISD to be able to go back to the old days and have a real low tax rate. That is the other side of the coin. Because then, we're unequal again. We're going to have to charge a hell of lot more in rate to get the same number of dollars that they get…But in terms of doing away with "Robin Hood", we're not opposed to it, but they've got to make sure that we don't go back to the days of old.

The school finance dilemma and struggle to reform it is about taxes (revenue) ***and*** cost (distribution of expenditures). Mr. Muñoz centers his argument on the redistribution of funding aspect of the school finance debate. I ask more probing questions regarding the revenue aspect or how the heavy reliance on local property taxes has crippled South Texas school districts. He is not opposed to eliminating the system as long as the leadership has another system in place to ensure equity regardless of the revenue stream. However, he chooses to not aggressively enter the tax structure fray. This further handicaps the group's efforts. I ask why he doesn't think it is a good idea to take a strong

position that the over reliance on property taxes disadvantages South Texas school districts.

> **Mr. Muñoz:** I've got to very careful that on subjects like that I don't, if there is one or two (STAS districts that are opposed) it's alright. If there is a few, it's not problem and we can still endorse them like that. But if it's even two-thirds, one-third, we're not going to. It's too much of division among us to touch something when we really don't have to. You see what I'm saying?
>
> **Interviewer:** Yeah.
>
> **Mr. Muñoz:** If we can touch it and stay united, we can touch something like that…If we can, it's important for us to stay united, that's what's made this little group function and as good as it is. People listen to us. They know we are united and I don't want to anything to mess with that. With a small organization, you're small to begin with and then you are divided, that really lower lessens your effectiveness.

The organizational and leadership decision to not enter the debate on the tax structure or revenue could be costly. It takes a discussion of the unfairness and racist nature of over reliance on property taxes off the public discourse table and eliminates the conflict that is necessary for the democratic, compromise and negotiation process to take place.

Full Equity is Not Achievable

None of the participants have strong opinions regarding shifting some of the tax burden from the local district to other aspects of the economic engine, namely a statewide property or personal income tax. The reluctance to speak about tax issues encourages me to broach the subject of full equity. The Equity Center has been the traditional

organization fighting for full equity in school funding, pursuing a legislative and legal course of action that would eliminate any "gap" in per pupil funding for every school district. I decide to ask the participants if they advocate a system or believe a system of full equality is achievable. Andres Rios exemplifies the group's sentiment with his response.

> **Mr. Rios:** No. I don't think that (full equity) will ever happen. Equity Center has to fight for that obviously but I don't realistically think that will ever happen.
>
> **Interviewer:** Do you think that STAS should fight for that? Or do you disadvantage yourself by fighting for that?
>
> **Mr. Rios:** Some of that. I know that our executive director, during the session, was eliminated from, or not invited to some of the sessions because of our particular stance. I don't know if Equity Center has been excluded but I imagine that they were. It's the classic Republican-Democratic struggle and I think we're going to end up getting screwed in South Texas.

Similarly, Hector Sobrevilla believes that "politically, it's not going to happen." He explains it by posing a rhetorical question, "Politics, money, power, who runs the show? Whoever controls the economy controls the future, and we don't control it."

Political leadership not friendly to the plight of South Texas school districts is blamed for the inability to achieve full equity. However, the participants do not volunteer their support for the concept. They are not ignorant of the fact that the state leadership is highjacking the equity issue and replacing it with a lower-cost, more-disadvantageous system. However, they also abdicate their role in progressive tax issue politics by not vehemently protesting over reliance of property taxes. José Ybarra explains:

> With the (political) leadership right now, no. The leadership today, they made certain promises and they are going to do those. They thought they were going to do them the first time (in the recently adjourned 78th Legislative regular session) but they realized that they didn't understand the system. They realized that if I recapture no more money, where am I going to get $2.2 billion? Hey, an eye-opener. And that's why I'm concerned about these people supposedly saying that they have already created a system. I don't trust them. And Grussendorf's favorite words was, "trust me, we're going to do the right thing for you." Well, I don't…The only reason why we are where we are is because of the court system. The court system and Scott (McCowan, the district judge that adjudicated all four lower court Edgewood cases) was excellent when he was there and being able to force the hand of the legislators to do something…It (a move toward equalized funding) would not have happened regardless if it was a Democratic majority. And so, here we go again.

Joe Treviño commends the Equity Center for pushing the full equity agenda however he also believes that "it is not viable." Moreover, he is "fine" with the $600 per pupil gap that the Supreme Court approved although he admits that the legislature has allowed the "gap" to widen. He states:

> I don't think politically it's going to be viable to get 95% equity or 98% equity. I think that is a very high standard for us to meet. And I think most of us are fine with some gap. I'm fine with a $600 gap. Let's just make sure that it doesn't go beyond that. Now remember, we are already $900 or $1,000…That is the role of that (Equity Center) organization. That is why that organization exists. And so I

think the pressure needs to be kept and I don't have any problem with what they promote. But I think when it comes down to it, I think some of us, not all of us, would say politically, yes, we're going to get to the 85% of the kids being in an inequitable system with a $600 gap, I'm fine with that. Now remember that my hope is that there are additional resources added to the system. And so that as rich school districts get more money, then I'm also going to get more money as a poor school district.

Proceeding Cautiously on Adequacy

The participant superintendents are much more critical about the proposals to move toward an "adequate" system of finance. They point to the narrow definition being advocated by legislators who are trying to cut back on the cost of education by relying on a low-cost "scientific" determination of adequacy. Manuel Lira is reluctant to shift from an equitable measure of fairness.

Interviewer: Are you worried at all about the talk towards adequacy?

Mr. Lira: Yes I am. I think we should be equitable. Adequacy, you know, it depends on who defines it. It may have a great impact. Even with the "Robin Hood" plan that is in place today, we are not able to provide some of these programs that I just talked about. Now if you cut the funding I don't know where we'll be.

Interviewer: Why are you worried about it? Is it that they will calculate "adequate" at too low a level?

Mr. Lira: That's correct. And we don't have a local tax base that we can fall back on.

Interviewer: Do you think the STAS will fight against a definition that is too low?

Mr. Lira: Yes. And the Equity Center will too. That's what it's all about, to provide an equal education, equal opportunities for all children.

Hector Sobrevilla believes that the legislature will define adequacy as "bare bones." He perceives that the move toward adequacy will only serve the interests of the rich and powerful legislators and their property-wealthy constituencies. Mr. Sobrevilla states:

> If I were to say that adequate for us is that we can have a fine arts program. If that's adequate for everybody then I agree, but it's not (what the legislature is trying to do). Adequate for them means bare bones, the survival stage. I mean, going back to the same scenario that we had twenty-five years ago. We don't want to use the word adequate because the word adequate to the people who are in power means again, bare bones, and they can afford to fund the enrichment part because they are going to have enough money…Adequate for them is going to be whatever they can afford. And again, we're going back to the same system that they had in Edgewood where within the same city, the economics between the north side and the south side didn't have the economy that the north side had and that's where the whole fight…You would think that people in Texas would say, "Well, you know, we should even it out."

Two superintendents, Henry Tamez and Chuy Gutierrez, critique the "two meanings" of adequacy that they perceive as coming from opponents of equalization. In speaking for the STAS, Mr. Tamez states, "We are arguing against the idea of adequacy." His rationale is explained by describing a scenario in which property-wealthy districts are

able to provide for extracurricular activities that his district can not afford and would not be able to afford under their definition of "adequate."

> **Mr. Tamez:** Equity and adequacy are two different things. What's adequate for us to educate kids and what would be adequate for Glen Rose to educate kids? That's two different numbers. His public and my public are different and what's adequate for me and what's adequate for him it's a very lopsided level. They are arguing for the $1.50 cap and adequacy. We want to keep equity where it is. We're not even at the adequacy side.
>
> **Interviewer:** You think that's pretty dangerous to let them decide what an adequate education is?
>
> **Mr. Tamez:** What's adequate? Adequate for who? *Ya te digo* [I've told you], adequate for Glen Rose would probably be that French field trip to Europe. *Y yo* [And me], I have a barbeque (plate sale) to send the girls to San Antonio for a cheerleading competition, you know. Shit, you've been on flights where a whole mass of high school kids, they've chartered the three-quarters of the plane. I've seen them. *Este, chaperones y todo*. [Ah, chaperones and everything.] You know, me I'll borrow a bus *y vámanos* [and let's go]! *N'hombe, no lo miro*. [No way man, I don't see how that's fair.] I can't see it.

Chuy Gutierrez implicates the legislature in its efforts to save the state money without having to consider more permanent, tax issues. He also sees the racism inherent in discussions to move toward adequacy. Evoking predominantly white, property-wealthy school districts in North Dallas, he explains:

To us, equity is what it's all about. They (the legislature) use the word adequacy rather loosely. To us, adequacy is not, is not synonymous with equity – to them it is, to us it's not. They are kind of telling us, "*Ustedes los Mexicanos* [You Mexicans], because you don't produce as much money, local revenue, we'll bring you up to a certain level which is adequate." And we're going like, "Why?" Why should our level be adequate at a different level than Plano or Garland Park (ISDs in the Dallas area) or whatever…That's what scares us. Now if they want to use the word adequate, that everything is equal and adequate, then we're okay. But that's not their thinking. They're trying to sneak this thing through us. We're not going to accept that…See, they're agreeing doing away with what they call the famous "Robin Hood" method. "Let's do away with this method okay. And yes, we'll determine a certain amount that's adequate to teach your children and we'll bring you up to there. But then the rest of the stuff that we produce, we need to keep." Is that equity? Hell no. Of course not.

The sole participant not combative and somewhat conciliatory in his discussion of adequacy and what it means for poor school districts is Joe Treviño. He mentions that the STAS must be willing to participate in the debate over adequacy because it is part of the discourse. Being active while advocating for "broader" definition of adequacy is beneficial to the region and will prevent the group from being shut out of the political process.

Interviewer: You are not against participating in the defining of adequacy?

Dr. Treviño: Adequacy is part of our vocabulary as it relates to the school finance system. I just think we have to be careful as to how that it defined. I want

to define it as a high level of education for all students. And right now the standard has been set in my mind. The standard is passing TAKS. And so then I now need all the help, all the assistance I can get to get my kids to pass TAKS. In doing that, I would probably take a broader definition of saying well, no pass/no play helps me get kids to pass TAKS because they are motivated, the coachers influence them a lot, the coaches develop their character and leadership skills a whole bunch and that's part of the education we ought to provide…We are going to have to defend a high level of adequacy because I think the approach is going to be, no, I want the low level of adequacy. So that I, as a state, don't have to come up with the additional state dollars.

Denial of an Inherently Racist System

I return to a discussion on over reliance of property values in the school finance system and attempt to engage the participants in a more critical discussion of formulating solutions that would include a diversification of tax revenue generation systems. The critical thinking on this topic is also absent. José Ybarra does agree that advocating for fairer, less-disadvantageous method of revenue generation would benefit his district and the region.

Interviewer: What do you think about the reliance on property values? Is that fair? Should the STAS talk testify and advocate more on this issue?

Mr. Ybarra: I think that that is an excellent point for us to bring the message back. It is not fair. It makes no difference what part of the state I live, if the property owner is the only one that is paying for the education of our students then that's not right. Something else needs to be done. And there is people who

talk about sales tax. There is people who talk about franchise tax because they say that one encompasses more than just one segment of society which are your property owners. And so yeah, I think that we need to be able to talk more about that. And of course, and we have for years, talked about the inadequacies between my property values and somebody else's property values.

I ask Manuel Lira the same question and receive the same basic response – historically the over reliance on property values has disadvantaged his district and districts like his. However, he does not follow up with a critical understanding of the tax system. Rather than denounce the inequity created by an over reliance on property value, he chooses to elaborate on the perceived political and business risk with instituting a personal income or more diverse set of taxes. He concludes by stating that for the meantime, the state is relegated to this so districts must adapt to the structure and "learn to live with it."

Interviewer: Do you think that the system relies too much on property values?

Mr. Lira: Definitely. Definitely. I think sales taxes are used for other purposes in the state like transportation, health care services and property taxes are used for education. And historically, you're right. And to change is a big (political and economic development) risk. To change it to a state income tax, right now the state leaders are not willing to take that risk. Texas is also trying to attract business from other states and foreign countries, to come here and develop and open up their businesses here in the state of Texas.

Interviewer: Do you think that testifying regarding our reliance on property values is a good strategy? Do you think it would help to bring up how that it is not fair?

Mr. Lira: I think you would have pros and cons. I think that you would have some pros that would be good for the Rio Grande Valley but you also have some cons. So it's a debate in regards to the use of property taxes. However, that is the only system we have in place now. Good or bad, that is what we have to work with and I think it will continue to be in this year.

When I first interviewed Andres Rios he introduced concepts of institutional and systemic racism and discrimination into our conversation. He is critical thinker in some senses, however when I broached the subject of the institutionalized racist nature of an over reliance on property values he shifted the discussion to inequity in who pays taxes.

Interviewer: Do you think that it is fair that the whole system is based on property values, but Mexican American and African American communities have very little property? Do you think that it is fair?

Mr. Rios: Well, 10% or maybe higher, I'm going to say 10% because that was the topic of conversation one time with a local businessman when we were talking about a bond, that 10% of the population in Laredo pays almost 100% of the taxes. I would dare say that the same thing applies in Dallas. The same arguments are heard because of all the apartments that existed in Dallas and Houston. The argument is, you know, why should we pay all this if those people, you know, they're not paying any property tax. I think, I guess if I had a lot of property I'd be upset but it's the only real thing we've got. I'm not smart enough to have a real opinion on that. I'm not astute in that area but it's the only thing that everybody has.

Interviewer: I think that the other big pot of money that could generate sufficient funds is the state income tax where (Texas Speaker of the House) Craddick has said, "We're not even going to talk about that."

Mr. Rios: Well, they damn sure don't want to be the party to put in a state income tax.

Mr. Rios refuses to discuss the importance of shifting the tax burden to a wider segment of society and fails to critically see how moving away from a reliance on property values would benefit his community. Joe Treviño similarly denies this critical view. Rather, he returns to his mantra of "more school funding." By not engaging in a critical discourse of tax revenue generation, STAS leaders and superintendents continue to disadvantage themselves and hurt their position within the school finance political debate. Dr. Treviño concurs that there is "an over-reliance on property taxes" but then follows up by stating:

> In order to keep the system equitable, they, the Legislature, have caused districts to send money back so we can keep an equitable system. But because the state isn't willing to put more of its money up and have a higher percentage of the cost picked up by the state we, locally, are picking that up. You know, right now, I'm not exactly sure what the number is, it's about 42%, so the other 58% the local districts provide. I think there is general unhappiness with the "Robin Hood" system but in order to resolve that then the state needs to come up with more money.

In an effort to further instigate critical thought I share the information from Appendix A of this study. The data which shows the 50 poorest and 50 wealthiest school districts as measured by property value and average daily attendance (ADA) illustrates

the racial hierarchy that is instituted by the school finance system. Together with the participants' historical reliance on state funding for the bulk of their operations and maintenance funds, I ask them to comment about the fundamental unfairness with a system that relies so heavily on property values as a method to generate school funds. Andres Rios does not choose to critically engage in this line of thinking as I ask him to review the list. Rather, he describes this phenomenon as natural and partly the doing of students who do not wish to experience other parts of the state or world. His response is to essentially blame the victim for not moving out of property-poor areas of the state.

> **Interviewer:** I did some preliminary analysis in which I listed the 50 poorest and 50 wealthiest districts. Seventy-six percent of the wealthiest are majority white and 76% of the poorest are majority Latino. What do you think this says about the school finance system? (Silence) Why do think that people don't like looking at this from a racial perspective? Why do think the system was developed this way?
>
> **Mr. Rios:** Well, it just is. I think it says something about what you and I talked about last time and that is that we need to move away. (Laughter) And get away from the comfort zone. I think that our people like to be around home and around family. We're not going to leave, I mean, I can't get kids out of Laredo. They want to go to college and come back, which is a wonderful thing, but I think if we don't go out and venture, if we don't go venture out, then we don't grow. Sometimes when you venture out, you see what's out there, you like it and you stay. But if you're going to come back, at least you've had the experience of going where you are. The beauty of having a TAMIU (Texas A & M International University in Laredo, Texas) here is also the beast because now they can be born,

go to elementary school, go to middle school, go to high school, go to LCC (Laredo Community College), and go to TAMIU and go back to work at one of the school districts or wherever and never leave and never have that different perspective. You know, I always used to marvel at kids who were children of service men when I was here or even when I was teaching because they come and they are so worldly, some of them not positively worldly, but even the ones that were not so, they knew about the world, they knew about a lot of stuff that's going on out there. And our kids were like this, all they knew was football, baseball, basketball, their girlfriend, where they lived, *y hay se acaba* [and there it stopped], and that's not good. I think that that, your original question, some of that is there. Now, I guess that's just a commentary. The other one just is. You've got poor and then you've got, the Anglos have and we don't have. We have to work harder to try and have and I don't know, some of those are born into it, just as some of ours are born into a cycle of poverty. That doesn't mean, well, I think it really speaks to the issue that there has to be an equitable way of distributing the money so that if that's the way it's going to be then Big Brother is going to have to help. Now, does it have to come out of the pockets of the rich guys, you know, and I talked to Wayne Pierce at the Equity Center, and I said, "Wayne, what's wrong with leaving Highland Park alone and let the state take care of everyone else?" And of course he went into this long diatribe about why that wouldn't work but I still say that if they worked hard to get their money or were born into it or whatever, so be it. Let's not just give them anymore money. You know, say, you

exist on your own and the five dollars that we have is going to go to the rest of the folks.

Hector Sobrevilla also characterizes the data as a natural part of the political life. The fact that Republicans rule the state government system makes the inequity more believable. However, he does fail in explaining the previous decades in which Democrats lead every major state political office. I ask him to review the data.

Interviewer: Would it help the STAS to use this data in testimony? What does this say about the system?

Mr. Sobrevilla: Yeah. Well, sometimes you wonder if it's intentional. Is it intentional based on the majority rule right now, for example, the Republicans? And the majority doesn't necessarily have to be white they have to be people who have the money. They are the one's that control the economy. So in essence, I think it boils down to the haves and the have-nots.

Interviewer: Do you think that could be intentional or is it just a little bit of both?

Mr. Sobrevilla: I think it's a little bit of both. You know and the thing is that I guess, I'm not going to think like a white (person), *pero* [but], I think in the back of the mind, you know, the minority is going to the majority in a few years, and it might be scary that we're going to be the one's in power.

Mr. Sobrevilla attempts to describe the changing demographics of the state in an effort to say that "things are getting better." I re-ask the question by citing specific data that affects him and his district.

Interviewer: The number stuck out to me how the Valley is really affected by this system. You can't do anything about your property value, yet the system is

based on property value. Highland Park is $1,052,000 wealth per ADA and you guys are $47,000. That to me…

Mr. Sobrevilla: $1,000,000 more.

Interviewer: Yeah, $1,000,000 more than you guys. And then you throw the accountability standards on top of that and how is that really fair?

Mr. Sobrevilla: Well the thing is this, I mean, for example in Plano or in Highland Park, most of the people there, because they have a lot of technology and business and giant corporations, which is fine and dandy but you are going to find the people who work there have a lot of education. So there kids are way ahead, just in the environment aspect of it. I mean down here, we have kids having to acquire a language. On top of everything else, on top of being poor and everything, they are having to acquire a new language. And then we are testing them. If they are here three years we've got to test them now according to the rules. What advantage do you see in that? The only thing that they are showing is that we are being held accountable but buy a biased system and yet we can't have excuses. Have one of those teachers from up there come teach down here, see if you can speak Spanish and she won't, or they won't. And if you take one of our teachers over there, they have Hispanics over there, well, they can teacher in more languages. So, its not a fair system.

Although Mr. Sobrevilla acknowledges that the system is unfair and not equitable, he does not engage in a more serious discussion of property values and the racial hierarchy created by the system's emphasis on them. José Ybarra is more receptive of the data and

states that he had not seen the data presented in this manner and could be utilized by STAS members in public testimony.

Mr. Ybarra: I think it would reinforce the point about how can one of these schools, just take a penny for example and just look at the difference. And that's why those that have the resources are saying, "Give us a ten cents enrichment." And I don't remember right now but somebody was telling me in some district you know they needed $80,000 or something, so the PTA within two weeks raised it for them. You know, our PTA can't raise $8,000, that's way too much. And so, there are disparities there. It's interesting about the ethnicity. Why are the rich districts white and why are the poor districts brown?

Interviewer: It's very segregated also. There are some districts with a large number of Latinos like Webb CISD but it's still very segregated.

Mr. Ybarra: And see, they are a tiny district.

Interviewer: Would it be beneficial to use this publicly or as part of a political strategy?

Mr. Ybarra: But I never have seen it this way, Enrique. It clarifies the problem that we have and maybe the problem as to why some people are saying, well, South Texas doesn't need any funds because they already got to much.

Interviewer: Racism as a hierarchy, not an individual level. This shows how the system is set up on property and how Latinos are disadvantaged. It is a way to show legislators and make an argument in black and white about how the system is set up to disadvantage some and benefit others.

Mr. Ybarra: That's true. And it's a way to do it without, *con* [with], "*los pobrecitos aca* [the poor little ones]," and all that stuff. And its amazing to me how that worked out.

The "pobrecitos aca" comment emanates from Mr. Ybarra's feeling and background firmly rooted in work ethic, struggle and determination. He does not want to labeled as someone taking a "handout" and believes a racial discourse would relegate the group as one making excuse or "playing the racial card" without merit. Mr. Ybarra engages more critically with the introduction of concepts such as racial hierarchy and institutionalism of discrimination.

Mr. Ybarra: You have some people Enrique, and I guess my way of thinking is a bit extremist, but you mentioned a little bit about the hierarchy, there are some people that says that because when you look at the requirement of the high school diploma and want to limit participation at the higher education level. Subconsciously, I believe there are some people on the other side that that is there intent (to be racist).

Interviewer: Same thing with redistricting too? (This is a reference to the Texas legislative redistricting fight in which minority voting rights were attacked.)

Mr. Ybarra: Well, yeah, same thing with everything. If the standards for entry level would apply to a lot of us, the ones that applied at UT and A & M, I never would have gotten a degree. So, yeah, you've got to be able to find ways to fix that and our gateway, for any race, is education. And we have the responsibility to provide that, but we also need to have the resources to do it.

Interviewer: And you think that's being extremist?

Mr. Ybarra: Well, yeah. I guess to some degree I feel that it is. And maybe because I tend to believe that we as a population, as a state, do not have it that good. Now are there skinheads over there, yeah, they are anywhere, *verdad* [right]? But that really would be an eye opener. (Laughter) If that ever was to be made public that my only interest in what I'm doing is to keep certain people from advancing or certain people in a place where they would have no control anymore.

Returning to an individual-level understanding of racism, Mr. Ybarra mentions skinheads and refers to the institutional racism embedded within school finance policy as similar. Henry Tamez agrees with the institutional racism that the school finance system creates. He reiterates how TASA, and its majority-White leadership, sided with the Republicans in the last legislative session when I ask him if using this type of data would benefit STAS members. In an effort to gauge his opinion more specifically, I re-phrase the question in terms of how it affects his district.

Interviewer: Look at Highland Park ISD and then look at Algodón ISD on the list of poorest and wealthiest districts. How can anyone justify this hierarchy when you have the same accountability standards to meet? You have the same federal and state standards that you have to deal with?

Mr. Tamez: But, Enrique, they've known this for decades. They've known this for decades. *Y ahorita* [And right now], knowing what Glen Rose and Tatum and Highland Park (three districts on the 50 wealthiest list) do, they still want to buck the (system), they're not going to listen to anybody. They've known this Enrique.

Interviewer: So it wouldn't help to bring it up?

Mr. Tamez: No, no, bring it up. *Pero* [But], I can tell you it has to be a (Joe) Wisnoski. It has to be a Lynn Moak. It has to be a TASB (Texas Association of School Boards). It has to be a TASA (Texas Association of School Administrators).

The two school finance experts, Joe Wisnoski[47] and Lynn Moak,[48] are both white men well known throughout the state. The two organizations, TASB and TASA, are also organizations that have historically been led by white, males. It is Mr. Tamez' intention to state that STAS leadership would not garner the type of support given to the other persons and entities if they were to introduce a racial discourse. Chuy Gutierrez, however, is the most supportive in using the data to demonstrate racism within the school finance structure. For a leader who is has been active in grass-roots, Mexican American community politics and as person who does not back down from confrontation and conflict, he is unsurprisingly enthusiastic to utilize the data in the political and policy discourse.

Interviewer: Do you think showing the breakdown of wealth by race to the legislature is helpful in communicating the STAS position on equity and fairness?

Mr. Gutierrez: Hell, yes! I would use this. I would not hesitate in telling them. It's very clear. It is very clear that the Hispanic kids are in the poorest districts. And it's very clear that these are the people that are going to fight us for equity. Can I get a copy of this before you leave?

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[47] Joe Wisnoski is Deputy Commissioner for School Finance and Fiscal Analysis at the Texas Education Agency and is thought as one of the most knowledgeable experts on Texas state school finance.

[48] Lynn Moak is also considered one of the foremost Texas school finance policy experts. He is a former Deputy Commissioner of School Finance and current partner with Moak, Casey and Associates, a school finance consultant firm based in Austin, Texas.

Interviewer: I can give that to you.

Mr. Gutierrez: (Laughter) All right.

The enthusiasm and critical thought that Mr. Gutierrez and Mr. Tamez utilize however, is for the most part nonexistent within the participant group. More prevalent is a desire to "blame the victim," gaze toward a "new and improved" era in which Mexican Americans will encompass a majority of the Texas population, and deny the historical, racist nature of the school finance system. Manuel Lira exemplifies this line of thinking in that his first response to the question of the racial hierarchy evident in the data is to mention history in passing prior to looking optimistically toward the future. Mr. Lira states:

> I think the state has neglected the Valley for many, many years. I think the first governor who really, I thought, made an impact in the Valley was Ann Richards. And I think that Ann Richards started with infrastructure here in the highway system. She saw a sleeping giant in the Valley…The population explosion here in the Valley, now you have a large number of voters, a large number of voters, and that has kind of woken up the state. The Valley is growing. It's growing faster than any part of the state. There is an increased number of voters in the Valley so they started paying a little more attention to the Valley. Unfortunately, the culture here in the Valley, I think, you have a very humble community, very family-oriented. At the same time, I think we have the third-generations coming up here in the Valley that are getting more educated. But the first and second-generations were not voters and were not educated. So I think that the voting part of the Valley is increasing as we have the third-generation and maybe even the fourth-

generation coming up and it will make an impact in the state. The number of businesses that have developed here in the Valley are opening up the eyes of the state. Major corporations are coming into the Valley – General Electric, Black and Decker, Panasonic – I mean, it's opening up some eyes. The trade that we have with Mexico and the impact that it is over the national economy, I think that has made an impact. In regards to the culture here, I do think the majority of the people here is slowly increasing their income power as we become more and more educated but we still have a large number of families that are on welfare, that need a lot of health services and that need a lot of support from governmental agencies. But I think that as time moves forward, it will be less and less as we get more and more educated people in the workforce.

Mr. Lira chooses to evade the question so I attempt to bring the focus back toward the racist nature of school finance policy as evidenced in the data of 50 poorest and 50 wealthiest districts. He responds by focusing on the changing demographics of the state and the need for Mexican Americans to improve their civic participation if a change is to occur.

Interviewer: Do you think using something like this would be divisive? And that it would not help the situation? By breaking it up by race?

Mr. Lira: I will talk a little bit about the Hispanic population. It's the fastest growing minority in the United States and in Texas. One of the things that I've been hearing lately from Governor Perry and Governor Bush is that this state needs to become more bilingual. I think it's catching on nationwide. Before, five years ago, that was not the battle cry in education. So, I think Hispanics, with the

state becoming more Hispanic in nature and the importance of educating the Hispanics is going to make or break the state…And I do think that legislators need to take look at the Hispanic population in the Valley and the impact that the Valley is going to have over the rest of the state. They need to look at the educational system and how they can best provide a better educational program here for the Hispanics in the Valley. If not, it may come back to haunt them. And it's not only in the Valley but Hispanics are all over the state.

Joe Treviño does not wish to engage critically on the racist structure of school finance. I ask him to review the data and ask if it is proof that majority-Mexican American school districts are severely disadvantaged and systemically kept from ever being able to legitimately compete.

Interviewer: What do you think the data says about the historic racism in Texas public school finance policy?

Dr. Treviño: (Long pause) Well, I don't think there is any question that historically minority populations have been poor and that as you think of school district with high minority populations that they are generally going to be poor. Now, I guess one of the interesting things that is happening, and I'm kind of getting away from your question, one of the interesting things that is happening is that we as a state are becoming more of a minority state. And I think even when you look at some of these rich school districts, and here I'm talking more of the large school districts not necessarily the small ones, I think when you look at some of the large school districts that are Chapter 41 school districts they are getting more and more and more minority students as time goes on. So I think that

> they are also realizing the need that high, at-risk kids have and are supportive of the kinds of things that poor school districts are supportive of – bilingual ed, weighted ADA, special funding for compensatory ed kids – all of that. They are also supportive because their populations in those demographics are growing. I think as it relates to property, I do support and do feel that in whatever new system is developed there needs to be a portion – and probably through real estate taxes – a portion of the taxes, a portion of the funding towards education that comes from the local community. I think the local community needs to continue to be vested in education. And the way to do that is to say, yes, I pay taxes towards it. It doesn't matter whether I have kids or not. If I'm a business owner, if I own property, I pay taxes. I think that's important for us to keep. I think the state has gone way beyond where it should be in its over reliance on that…We educators probably aren't, I know we're not the experts on taxes and on collections of revenues and how should be taxed and what kind of tax system should we ought to have. I mean we study it and learn more about it just because we have to.

A majority of the school superintendent participants did not want to engage in a critical discourse or analysis of racism fostered through the school finance system. A denial to accept this perspective of policy analysis will further disadvantage school district leaders as they continue the struggle toward the equitable, sufficient and fair amounts of funding that they professed were necessary in the previous subsections. The lack of critical thought to this critical subject area becomes more pronounced in an

analysis of the public testimony or discourse that STAS leadership provided to members of the 78th Regular Session of the Texas Legislature.

Public Advocacy

This section of the chapter will analyze public testimony from two legislative hearings in 78th Regular Session of the Texas Legislature (January – May 2003).[49] In the hearings, members of the STAS and participant superintendents testified against proposals to eliminate the current school finance system. Their testimonial data demonstrates a lack of historical perspective, an uncritical analysis of fairness and equity, and an abdication of an uncompromising, moral stance that may prove beneficial to South Texas school districts in future policy debates. The educational leaders miss an opportunity to voice their strong support for the poor, majority-Mexican American school districts they represent and allow any discussion of the over reliance on property values to be omitted from the political discourse.

A Variance in Public and Private Discourse

On February 4, 2003, the Texas House Public Education Committee, led by Chairman Kent Grusendorf, held its first public committee meeting of the new legislative session. The first bill to be introduced and heard in a public forum, House Bill 609, was sponsored by the chairman. House Bill 609 (2003), §1 states, "Chapters 41, 42, 45, and 46, Education Code, are repealed." As explained by the sponsor and chairman:

[49] The testimony, minutes, text, witness lists and fiscal notes data used in this section of the chapter was compiled from the Texas Legislature, House Committee on Public Education website at www.house.state.tx.us/committees/400.htm. Public testimony was downloaded from the link to Broadcast Archives on the previous website link. The data was transcribed from the Real Audio archive and analyzed.

> This is a real simple bill. House Bill 604 sunsets the entire education finance code or school finance code of Texas no later than September or effective on September 1, 2005… I think the bill sends a very strong signal to the general public, the tax payers of this state, school community in this state, that the legislative leadership is committed to solving the school finance problem… It also allows to start with a blank slate, a clean sheet of paper, to start all over, to completely review school finance in this state, brings all parties to the table, but mainly, the point I would like to make to you, Mr. Chairman, Mr. Vice-Chairman, House Bill 604 is a ***beginning*** (emphasis) of a process, this is not an end… We'll be debating in the House and the Senate side during this session about ways to design a better system – a fairer and equitable system and a permanent system for a permanent solution.

Straightforward in its purpose, the bill negates the complex road equalized funding took to reach its current state. Characterized as a "simple bill" meant to be a "beginning," its clear goal is to destroy the equalized system of finance that majority-Mexican American school districts struggled to create since the Rodriguez court case. Whatever his intentions, Chairman Grusendorf's assertion that a "fair and equitable" system is his goal also provided an opportunity for STAS leadership to testify as to the current inequity and unfairness of the school finance statute. This strategy would have made the two sides unlikely advocates for the elimination of "Robin Hood" but it would have also enabled a more visionary, moral and socially just policy proposal to be presented and endorsed by the Mexican American educational leaders.

Although the bill did not make it through the entire process in its introduced form, examination of the public record and testimony provides valuable data about the public discourse used to frame the debate on school finance policy. During the meeting, the committee heard from seven individuals who endorsed the bill and three who opposed it. The committee adjourned in approximately three hours after voting to approve the bill and recommended it to the full legislature. In the span of three hours, the committee and its leadership voted to destroy the over thirty years of struggle, advocacy and commitment to school finance equalization. One study participant, Richard Muñoz, representing the STAS testified in opposition of the bill. His testimony communicated the districts' fear of returning to a system of inequity but it also varied greatly from the private discourse – that the current system, while better than before, still had not met the adequate and equitable threshholds necessary for all students to succeed.

Ahistorical Testimony

The first House Public Education committee had an overflow crowd, probably because it was the first gathering of new legislative session and because of the highly controverial first bill. Richard Muñoz introduced himself and described the STAS by stating, "Our association represents sixty school districts and approximately 400,000 students from Brownsville to little north of Corpus Christi." Mr. Muñoz then began a testimonial devoid of historical context. He attempted to placate the committee by crediting them with funding that has provided for both equity and adequacy, although each of the STAS participants has stated in their interviews that funding has not been adequate to provide the type of academic programs necessary to meet the current accountability measures. Mr. Muñoz states:

> We'd like to thank you for what you've done for property-poor school districts over the past few years and trying to set a high standard in terms of adequacy and equity. At this point we are testifying and we respectfully oppose House Bill 604 as introduced. Our opposition is based on the failure of the bill to commit to retaining at least the current levels of equity and adequacy achieved by the current school finance system. Most of our members participated in the Edgewood litigation and believe that the principals of that litigation must be retained in the design of any new school finance system. These principles include the commitment of funding necessary to achieve a high level of accreditation and use of a high standard of financial equity and a commitment to a state/local facilities funding partnership.

Although Mr. Muñoz mentions a "commitment" to a "high level" of equity, the private discourse and review of the literature exhibited in previous sections runs counter to his public testimony. The "equity" provided by the legislature is legally and politically acceptable as allowed by the "substantially equal" language in TEC, Chapter 42, however his testimony neglects to critically inform the committee of the practical, real-world experience of running majority-Mexican American and poor school districts with insufficient and inequitable funding.

Rene Oliveira, Democrat from Brownsville, attempted to steer Mr. Muñoz in a more critical and historically accurate direction, however the chairman interrupts and challenges the line of questioning by interjecting some less than whole interpretations of court case history.

Mr. Oliveira: What kind of havoc would that (elimination of the school finance system) wreck on superintendents all around the state who perhaps have been dependent on this system for the last ten to twelve years?

Mr. Muñoz: Well, our property wealth per student is very, very low. Our particular area represents some of the poorest school districts in terms of property wealth in the state. It's not unusual, in fact it is the rule, as opposed to being the other way, that most of our districts are in the area of 80 to 90% state, 10% local (funding levels).

Mr. Grusendorf: Mr. Muñoz, can I interrupt and ask a question? The policy you're concerned about here, if I remember right, that's basically court precedent, is it not? Isn't that the basis of the Edgewood litigation?

Mr. Muñoz: Yes, sir.

Mr. Grusendorf: Do you understand that House Bill 604 would in no way overrule or reverse the Texas Supreme Court?

Mr. Muñoz: Well, the only thing I can understand here is that it takes out those provisions that are in the current education code that address…

Mr. Grusendorf: But, but, but if we were bound by those, by court order we would continue to be bound by those equity considerations in the future.

Mr. Muñoz: Well we would hope so.

Mr. Grusendorf: We would.

Mr. Oliveira: May I finish? Thank you, Mr. Chairman. Your fear then Mr. Muñoz is, I believe the chairman of our committee in that he will, I take his comments to mean, that he will support and always has supported some sort of

equal funding or substantially equal funding for all the 4.2 million school children in the state of Texas. But your fear is that there is another 179 or 180 of us (legislators) out there and you don't know what all the rest of them are going to do, do you?

Mr. Muñoz: That is correct.

Mr. Oliveira: And there are some people that want to go back to the way it was before and allow wealthy districts to keep what they consider as "their money," and cause this unequal funding that required the Supreme Court of the state of Texas to review this on multiple occasions. Isn't that your concern?

Mr. Muñoz: That is correct sir.

Mr. Oliveira: And you concern is that because if we go backwards, a substantial amount of the children in this state, could be looking at completely different schools, completely different resources, completely different personnel, or maybe lack of all of those things, isn't that right?

Mr. Muñoz: Particularly in our area.

Mr. Oliveira: Particularly in South Texas, but that applies…

Mr. Muñoz: Across the state.

Mr. Oliveira: Across the state. This isn't a border issue. This isn't a Valley issue. It isn't a South Texas issue. It's inner-city Houston. It's East Texas. It's all around the state, isn't it?

Mr. Muñoz: That is correct.

The challenge presented by Mr. Grusendorf was that a court order would prohibit the legislature from going back to the "bad ole' days" of inequity and low tax rates. Rather

than critically opposing his contention that the Supreme Court Edgewood decisions would "protect" notions of equity, both Mr. Muñoz and Mr. Oliveira neither elaborate on the built-in inequity within the school finance formulas nor attempt to interject the unfairness of basing the system of property values. They neglect to cite that, although a majority of Texas school districts would be negatively affected by the elimination of "Robin Hood," the districts most affected would be majority-Mexican American school districts – the same ones that instigated the court rulings and never let the legislature shirk its responsibility.

Ahistorical testimony de-contextualizes the policy debate, allowing those not wanting conflict or discomfort to engage the political discussion from a less-obtrusive, "neater" platform. It allows those opposed to full equity and a redistribution of funds to propose ideas that would institute "adequacy" as a substitute to equity. This type of testimony also presumes that all districts operate from an equitable starting point and that funding structures have not traditionally disadvantaged certain groups of people.

Unwarranted Gratitude

Mr. Muñoz' testimony also failed in the way that it thrusted unwarranted gratitude upon the committee although most of the Republican members have traditionally fought or run political campaigns on platforms to end the "Robin Hood" system of funding. Chairman Grusendorf led opposition efforts in past legislative sessions but because he was always in the minority, he was never able to garner much support for his projects – voucher and privatization bills. State Representative Madden, another Republican member, attempted to question Mr. Muñoz conceptions of equity and adequacy. When

challenged, Mr. Muñoz expressed gratitude toward the legislature for the change in the last "six or eight years" although he admits that the funding is not where it needs to be.

Mr. Madden: Mr. Chairman. You indicate in your statement that you pose the bill because it fails to retain the current levels of both equity and adequacy. What levels of adequacy? Have we achieved adequacy? Is that your statement here, that we have that level?

Mr. Muñoz: No, sir.

Mr. Madden: But you want us to maintain the current level of adequacy?

Mr. Muñoz: That level, that there would be some type of guarantee that we're not going to be stepping back, instead, maybe at least go forward.

Mr. Madden: What level of adequacy are we at?

Mr. Muñoz: Well, we've had a lot better adequacy in the last six, eight years. I know as long as I've been superintendent, than we had before that. We've made a lot of progress in that area in terms of what the state provides to the property-poor school districts, ah, ah, to make up for the lack of local property wealth. And if we look at it in terms of what didn't we have and where are we at now, we can't complain with what you've done for us. Is it adequate? I don't know. Somebody needs to define that but at least we need to be going forward from here and not necessarily looking at going back.

Mr. Madden: But you are stating that anything we do should maintain at least the current level of adequacy?

Mr. Muñoz: Of where we're at, yes, sir.

Mr. Madden: Thank you.

There exists, once again, a contradiction between what is privately stated and what is stated in public. Mr. Muñoz calls the current level of funding "adequate" although he admits that it has not been defined. It appears that this seemingly "confused" response is an example of how the STAS or Mr. Muñoz specifically, does not want to offend or introduce conflict to the equation. In his view, giving praise and thanks to the legislature for their "commitment to equity and adequacy" is a safer method for approaching the problem.

Nonconfrontational Accommodation

Mr. Muñoz, in the previous subsection states that "we can not complain" with what "you've done for us." His accommodating style is nonconfrontational and amiable with the often unbending legislature. In his testimony, he refutes his own private discourse and the discourse shared by the other members of the STAS. His testimony on school facilities funding further exemplifies the accommodating nature of his political discourse. Mr. Muñoz communicates the significance of facilities funding for STAS member districts and although he mentions the disproportionate benefits accrued to STAS districts due to the IFA program, he fails to point out how EDA funding further entrenches inequity by denying benefits to poor school districts not able to incur debt without the up-front commitment to help from the state. He testifies:

> Many of our districts in our association are growing at a pretty good clip, in terms of percentage growth per year and we are very property-poor and we depend a lot on the IFA and the EDA – mostly on the IFA, the Instructional Facilities Allotment. Failure to retain these provisions could endanger both past and future debt.

The bill eliminates funding for both EDA and IFA but without an assurance of facilities funding, districts in the Rio Grande Valley can not issue debt on their own local tax base. The chairman attempts to condescendingly shift the conversation stating that the bill does not prohibit previously-approved debt service to maintain funding however Mr. Muñoz reiterates that the new bond funding is what will aid those districts that are growing rapidly.

> **Mr. Grusendorf:** Do you realize that the committee substitute does address your issue of facilities, being able to pay for facilities in the future?
>
> **Mr. Muñoz:** Maybe not. My understanding of the committee's substitute, and you know, I may not be totally, I read it yesterday.
>
> **Mr. Grusendorf:** You have seen it then?
>
> **Mr. Muñoz:** Yes, sir. It more less guarantees that the state is going to be there to pay for existing debt that has been incurred with IFA and EDA and so forth. But, it doesn't take care of, we're fearful of, new debt.
>
> **Mr. Grusendorf:** It doesn't take care of new debt. You are correct. Any other questions for Mr. Muñoz?

The chairman attempts to discredit Mr. Muñoz' testimony once again by characterizing it as one based on a "fear of unknown." What Mr. Muñoz fails to point out to the committee is that the history of school finance is known very well, especially by him and members of the STAS. For whatever reason, the strategy to not vigorously defend and critically inform the committee of this is not pursued. Instead, Mr. Muñoz is left standing in front of the committee in what sounds like a defensive posture, defending his "special

interest" group rather than testifying on behalf of poor, majority-Mexican American school districts that are disadvantaged by a racist, school finance policy structure.

Mr. Grusendorf: May ask you a quick question Mr. Muñoz?

Mr. Muñoz: Yes, sir.

Mr. Grusendorf: You've got a certain area of the code that is very important to you. Is that correct?

Mr. Muñoz: Yes, sir.

Mr. Grusendorf: And your main problem is that this sunsets that part of the code. We're also "sunsetting" parts of the code that deal with other special interest groups, right?

Mr. Muñoz: Yes, sir.

Mr. Grusendorf: So, the Chapter 41 districts are sunset as well, right. We're dealing with a lot of small and rural adjustments, this adjustment, that adjustment, so we're putting everything on the table. You sort of understand? I'm just trying to explain to you our logic in trying to start with a clean sheet of paper.

Mr. Muñoz: Yes, sir.

The "clean sheet of paper" does not consider the historical context, it disregards the racial hierarchy inherent in the system and it lumps both the distribution and revenue generation aspects of the school finance system in an effort to deem it unfair, inefficient and in crisis. While Mr. Muñoz must not become the lone scapegoat in his valiant efforts to defend his position, STAS leadership must take some responsibility in the manner for which this first offensive action to eliminate "Robin Hood" was defended. The committee meeting may have been a formality in the passage of the bill out of committee; however a

stronger presence defending the thirty-year struggle for school finance equity could have been attempted but was not.

Compromising a Moral Position

On March 11, 2003, the Texas House Public Education Committee held a meeting to discuss, among other legislation, House Bill 5 (2003). The bill, once again sponsored by Chairman Grusendorf, was meant to complement House Bill 604. If passed and signed by the governor, it would provide additional funding over the next two years prior to the elimination of the school finance system in September 2005 by House Bill 604. The additional funding for the next biennium was provided so that districts could continue to operate over the next two years. The bill amended TEC, §41.002 (a) to allow property-wealthy districts to keep more of their local funding by raising the recapture level from $305,000 to $315,000. It also provided more funding for the Tier I basic allotment – from $2,537 to $2,637 – and raised the guaranteed yield in the Tier II formulas $.20 from $27.14 to $27.24. The net effect of this bill would have created a larger gap between Chapter 41 property-wealthy districts and property-poor Chapter 42 districts. Among those registered to testify on behalf of the STAS were six superintendents. Of the study participants, Joe Treviño, José Ybarra and Richard Muñoz testified against the bill.

"We are appreciative, but we oppose the bill"

Richard Muñoz was the first of those opposed to testify. He introduced himself as a representative of the STAS, described the member districts' demographics and stated "fifty-five are among the lowest in terms of property-wealth per student in the state of Texas." Mr. Muñoz was once again appreciative of the legislature for there efforts to

appropriate additional funding over the next two years but lacked the critical forethought to point out that although additional funding would be provided, the "gap" between property-wealthy and property-poor school districts would increase. He stated:

> We oppose the bill. We are very appreciative of the money that is in the bill for the next two years. However, the sunset or the repeal of Chapters 41 and 42 are what we're not in favor of. We feel that the system that we have, while not perfect, has done great things for poor school districts in the state of Texas.

Rather than critically inform the legislative committee of its continued reliance on an inequitable system, he focused on, "while not perfect," the system had improved their financial situation. He did not share the inequity experienced at the district level, the inadequacy at the local level, nor the challenges faced by districts trying to maintain a very basic level of operations. Dr. Treviño also employed this strategy of showing appreciation to the committee followed by a denouncing of the bill.

> **Mr. Grusendorf:** Joe Treviño, Karankawa ISD. The man wants that wants comp ed relief.
>
> **Dr. Treviño:** Thank you, Mr. Chairman. My name is Joe Treviño and I am the superintendent of Karankawa ISD. First of all, I would like to thank the chairman for his courageous stance of adding money to education. I don't think you'll get any argument from any educator that indeed, whether you're Chapter 41 or whether you're Chapter 42, there is additional resources that we need, particularly facing the new accountability system and facing the new test that we are implementing this year. We are very hopeful and our prayers are with you and the committee that we are successful with that.

More than Mr. Muñoz, Dr. Treviño singles out the chairman and thanks him for his "courageous stance" of adding more money although most of the study participants stated that it was the duty of the legislature and state to provide educational opportunity to all children, regardless of their background and the region of the state that come from. He also attempts to empathize with all districts, including Chapter 41 or recapture districts, in their struggle for providing an education.

José Ybarra provides more contextual testimony than the other two by describing his district and the student population it serves. As did Mr. Muñoz and Dr. Treviño, Mr. Ybarra states, "I applaud your efforts at a time when the state has an economic crisis that you want to go ahead and keep the formulas we currently have" for the next two years. In our private interviews, he concludes that only basic services are being provided and that despite the equalized system of funding has had to cut professional positions from his budget in order to meet a minimal, 2% pay raise for his teachers. Nevertheless, Mr. Ybarra states:

> I'm José Ybarra, superintendent of Nopalito. Nopalito is a 3A district, 1,500 students. Thank you, Mr. Chairman, members of the committee, for giving me the opportunity to come and visit with you briefly this afternoon…In my district we've been at $1.50 for two years now, so any money that you can send our way we certainly would be appreciative. However, I am here to testify against this bill because it repeals 41, 42, 46 and it does not seem to have a vehicle in place to replace that. I believe that the best decision that could be made is for a vehicle to be in place before this one is repealed.

The three leaders are appreciative for the funding they have received from the state and one can not blame them for testifying to this. However, it is clear from the private discourse but what they receive is not sufficient to meet the state standards and their own conceptions of what a well-rounded educational experience should be. They operate under a politically-weak position in which they express appreciation for the "bone" (as characterized by Andres Rios) offered to them by the legislature while also testifying against the bill that would provide them with additional funds. The leaders negate their critical, experiential knowledge for a perceived moderate, politically-prudent testimony.

Satisfied with Inequity and Inadequacy

By not addressing the issue from a more critical perspective, it would provide the leaders the opportunity to communicate their dissatisfaction with the inequity and inadequacy within the so-called "Robin Hood" system of finance. It would allow them time to refute public perception that they operate inefficiently and "steal" from the property-wealthy districts in doing so. Mr. Muñoz states that the system is "not perfect" but rather than critically argue for a more equitable and fair system as argued in some of the interviews, he asks the legislature to continue to fund schools in the same way. In an effort to communicate his point, he states:

> I remember the days when all we could be was used school buses. I remember the days when all we had was primarily portable buildings in our school districts. Thanks to the work of the Legislature, thanks to the Court, that has been taken care of. Thanks to Chapter 41 and 42 that has been taken care of.

In introducing discourse on the "bad ole' days," Mr. Muñoz neglects to thank the many poor, Mexican American parents, progressive educational leaders and social justice

activists who fought since the late-1960s for equity and fairness. He also fails to mention how they struggled for many years against legal and legislative efforts to resist any form of redistribution or recapture of local property taxes. While the system may have improved, some of the experiences from the "bad ole' days" continue to occur. In the previous subsection, Manuel Lira provides an example of he can not purchase necessary buses to transport his increasing enrollment and the many portable buildings that students in Brownsville must experience. The result it that Mr. Muñoz characterizes the system as "good enough" rather than arguing for a more equitable and adequate funding system that would require more of a commitment from the state's coffers.

In arguing for "substantially equal access to similar revenue per student," Mr. Ybarra is accepting state-mandated inequity. His testimony attempts to persuade the committee to add this language from TEC, Chapter 42 to the bill so that property-poor districts may have some comfort with it. An exchange with Chairman Grusendorf illustrates how the legislative leadership is able to shift the discourse from what that demand full equity for all, to one that relies on a "substantially equal" standard that has been shown to institute inequity.

> **Mr. Grusendorf:** I've got one additional question for you. You talked about you hate to see it sunset without something to replace it with. Are you aware of the Legislature ever sunsetting anything where we had the replacement in place beforehand? Isn't sunset a process to where you find a replacement? I'm not aware of us ever sunsetting something where we knew what we were going to do.
>
> **Mr. Ybarra:** I'm not aware of one but I am concerned that if we don't have some parameters if nothing else that we will have some problem.

Mr. Grusendorf: Does the equity language we put in the committee substitute give you any comfort level there?

Mr. Ybarra: I little bit but I recommend and I failed to state that, I am recommending that if you add 42.001 (b) it would help.

Mr. Grusendorf: You understand why didn't put that in?

Mr. Ybarra: No, sir. I do not.

Mr. Grusendorf: It deals primarily with property tax and hopefully, it is my hope that we move significantly away from property taxes as a way of funding our schools. I think that's what we need to do if we are going to have a permanent solution to this problem.

The chairman states his desire to move "significantly away" from property taxes as the primary method of funding schools – a proposal that could critically be argued for by STAS district membership. What he does not share is that he also endorses a method of calculating an "adequate" cost of education such as the one proposed by the Texas Public Policy Foundation (Vedder & Hall, 2004a) that would be "scientifically" set low. This would enable the state to reduce its share of school funding and not require the difference to be made up from property-wealthy school districts. The testimony fails to support an elimination of property taxes as the sole method of funding school districts. It does not challenge the chairman's assertion that the court decisions will "protect" equity and it reinforces the perception that "Robin Hood" generates equity and adequacy for their districts – a notion we know to be untrue from the interviews held with the eight participants.

Fear of the "Unknown" Although It is Known

The chairman of the committee likens the participants' testimony against his bills as a "fear of the unknown." The participants contribute to this characterization by failing to critically refute his assertion that they "fear" what will happen if "Robin Hood" is eliminated. With their countless years of administrative and personal educational experience in segregated and unequal educational systems, they compromise their moral stance that equity does not exist and funds are not sufficient to meet their districts' needs. Mr. Muñoz' testimony is at first easily contradicted by those favoring an end to "Robin Hood" because of its retreating or defensive nature. In an exchange with two committee members, he allows the committee chairman to characterize his argument as a "fear of unknown" – a fear that he asserts, all districts must contend with during a time of uncertainty.

> **Mr. Grusendorf:** Mr. Pena, did you indicate to me this morning that your major concern is really, fear of the unknown?
>
> **Mr. Muñoz:** That is correct. We don't have anything to show us what we have, that will replace what we have will be better than what we now have.
>
> **Mr. Grusendorf:** Aren't we all, to some extent, in the entire school community, concerned about the fear of the unknown because of the litigation, we'll have an unknown too? Isn't that just a real fear that we all have?
>
> **Mr. Muñoz:** Yes, Mr. Chairman, with all due respect, our school districts, who are among the poorest, in terms of property wealth per student, who have the highest number of kids, in terms of percentages of low-income and also have the largest percentages of numbers of kids that are bilingual, we have the most to lose with this. And that's what we are fearful of. All the witnesses that come before us,

have things to lose but we have the most to lose if that system doesn't come out any better or as much as what we have today. And it is fear, yes sir, you stated correctly.

Mr. Dutton, Democrat from Houston, argues that the court decisions provide a "safety net" for equity but does not discuss the highly interpretive and evolving nature of the equity concept. At this point, Mr. Muñoz has the opportunity to shift the testimony and to utilize his extensive experience and knowledge of inequity to his advantage by explaining how districts in South Texas would be affected without some form of equity. However, his testimony once again does not call for full equity and fairness in a critical manner. It does not point to the equity "gap," the inability for districts to issue debt without state assistance and disadvantageous nature of the state's over reliance on property values.

Mr. Dutton: But isn't, don't all of the court opinions provide sort of a safety net in terms of that fear that you may have, in terms of what the Legislature can and can not do?

Mr. Muñoz: Yes, they do.

Mr. Dutton: Okay.

Mr. Muñoz: In answer to your question.

Mr. Dutton: That's what I thought.

Mr. Muñoz: Will they continue to stand up? That's another issue.

Mr. Dutton: But, I mean, right now, the current Edgewood and all the progeny after that seems to me to eliminate, at least from my perspective, part of my fear about the elimination of Chapter 41 and 42.

Mr. Muñoz: But equity has various definitions.

Mr. Dutton: I know but under the way I've sort of followed the court opinions that exist now, that are on the books, now, I'm not suggesting that some of that could not be changed, but I just suspect that the court is not likely to go back over the whole twenty year, thirty year history of court cases to find some other means to establish equity that would not be to your detriment…my fear is not nearly as great of the unknown because I do have at least that in effect as a safety net so that I know that I'm never going to be worse off than where I'm at now, no matter what happens. And no matter what we do, I don't' think you're going to be ever worse off than you are now.

Mr. Muñoz: The chairman has been very gracious to allow us time to explain our side to him on two different occasions and for that we're very grateful. He's been very open to hearing our opinions. Everything that he has told us, I don't have any problems with.

Mr. Grusendorf: It's just the unknown.

Mr. Muñoz: It's more than the unknown. We have fought, everything that we've gained has not come easy. It has been hard work, session after session.

Mr. Muñoz begins to introduce a critical, historical perspective. Throughout Mr. Grusendorf relies on a "fear of unknown" argument that Mr. Muñoz concurs with although he is clearly qualified to discuss what he does know firsthand – the historical inequity, the struggle to change the system, and the current inadequate state of public school finance in South Texas. He is kept from finishing this line of testimony.

Both Dr. Treviño and Mr. Ybarra also use "fear" as central points of their testimony which in and of itself is not negative. While Dr. Treviño states that his fear lies in taking a "step back towards inequity," he fails to further contextualize the history of education for Mexican American school children – how they were denied quality teachers, adequate school facilities and genuine educational opportunity to succeed. Dr. Treviño states:

> I came to differ and to testify against the bill as it relates to the sunsetting of Chapter 41 and Chapter 42. And yes, indeed I am very fearful of a great number of things that might occur as a result of that sunset. Certainly we would hope and we commend the position that no, we're not gonna take a step back towards inequity. But indeed if we look at the history or what it took to get to this point, the thirty years, the four court cases, yes, I think there is some fear among some of us that we would take a step back. There is no question in my mind that we need to find a way of additional resources for education. Yes, indeed it means restructuring the tax system and so today, really I am here to tell you I am against the bill for these reasons that I've stated.

Mr. Ybarra similarly is fearful of returning to the unweighted system of funding which would not benefit his budget. The chairman brushes over his examples to ask brashly if, "again" he is fearful of the "unknown."

Mr. Ybarra: I fear like my colleagues and when I look at how we are going to be distributing this $300 by ADA not by weighted ADA, then I'm fearful that might be the way of the future and that after September the 1st of 2005, that we will be receiving our revenues from the state on weighted ADA. Doing a simple calculation for my district by

figuring the basic allotment that we currently have, which is $2,537, multiplying my ADA, my district would lose $2 million if we do not maintain the weighted system that we have or something similar. Thank you.

Mr. Grusendorf: Again, your testimony is fear of the unknown?

Mr. Ybarra: Yes, sir.

The study participants are fearful because they "know" from expereince what the debate over school finance reform is about and "know" the history from which their region and districts evolved. Yet, they fail to utilize this knowledge in their discourse. The legislative leadership chooses to characterize their opposition to the bills as a fear of the unknown legislative reforms but the participants intuitively understand how the current Tier II funding formulas work to disadvantage their districts and why EDA garners higher appropriations than IFA. Their public testimony, however, varies from the private discourse documented during the interviews. In the end, it compromises their arguments moral foundation and weakens their political footing.

Conclusion

This chapter examined three chapters of the Texas Education Code in an effort to critically examine how they institute a racial hierarchy and disadvantage poor, majority-Mexican American school districts. The 2002-2003 TEA data documents how participant districts rely heavily on state funding and disadvantaged by the over reliance on property values to generate state aid. The second section of the chapter outlined and discussed how study participants discourse school finance issues in private interviews while the third section evaluated the public testimony provided to the legislative committee by STAS members. What emerged privately were themes teetering on a critical race

discourse in which the inherent fairness and inequity of the state's system is repeated by the majority of participants. Contrary to the interviews, public testimony contradicted and negated much of what was stated by the participants. The public discourse was ahistorical, devoid of critical thought and accomodating in style. The last chapter will summarize the findings as well as provide conclusions and implications of this study.

CHAPTER VI: SUMMARY, CONCLUSIONS AND IMPLICATIONS

Summary

The legal and political struggle for equity and fairness in Texas school finance, ongoing since the mid-20th century, was acknowledged by and considered in Rodriguez v. San Antonio (1973) federal court case (San Miguel & Valencia, 1998). After the lower court decision was overturned by the U.S. Supreme Court, the strategy to challenge the public school finance system in state court soon emerged. The first challenge to the state of Texas and its method of school funding came in 1984 by plaintiffs from the Edgewood Independent School District, along with other property-poor, majority-Mexican American school districts. Through four Texas State Supreme Court rulings, numerous legislative sessions and hearings, and countless efforts at political organizing and advocacy work, the plaintiffs were able to achieve some measure of an "equitable" system in 1995 with the last of the Edgewood court case judgements. Access to "substantially equal" funding, a redistribution of a portion of property-wealthy school district tax collections and limited assistance with facilities funding vastly improved the system of school finance (Cardenas, 1997; Farr & Trachtenberg, 1999).

A second leg of court challenges to the current method of school funding began in 2001 and today, a new struggle for school finance reform is underway (Alvarado-Plaintiffs, 2004; Thompson, 2003; Wolfson, 2002). After nine years of relatively-nonexistent litigation and political upheaval, the same groups of constituencies – property-wealthy, Tier II, and Edgewood districts – are preparing for a new round of policy and legal strategies aimed at re-creating, dismantling and/or sustaining the "Robin Hood" system of financing public schools (Alvarado-Plaintiffs, 2004; Thompson, 2003).

The Texas legislative political leadership has joined the fray by forming the Texas School Finance Project in an effort to formulate solutions proactively, rather than awaiting court directives as was the case in the Edgewood drama (Farr & Trachtenberg, 1999).

As I've argued in this study, the role played by educational leaders of poor, majority-Mexican American school districts will be instrumental in shaping and influencing the policy debate at the macropolitical level. Specifically, the organization formed by South Texas superintendents during the 1990s is a critical first step toward better organization, cohesiveness and formulation of a common purpose – ensuring equity for poor, majority-Mexican American school districts. Because schools in the Rio Grande Valley have the most to lose (and gain) with a change in the funding system, it is vital that the leaders organize, formulate policy positions and conduct regular organizational meetings that will improve their political and advocacy positioning. Considering school finance policy from a critical race perspective and understanding how these educational leaders publicly and privately discourse about school finance policy is essential to effectively formulating political strategies meant to represent poor, Mexican American communities.

Scholars have demonstrated the absence of and argued for a critical race perspective in education policy analysis (Brady et al., 2000; Parker, 2003). Others have examined the inexistence of critical race political analysis in education (López, 2003) in an effort to demonstrate the need for conducting this type of research in the educational administration field of study. As my literature review indicates, race and racism have been viewed from varying prisms as well. Among them are:

- Race defined as a biological fact or natural occurrence

- Race defined as ethnicity or as based in culture
- Race defined as a nationalistic, unifying term
- Race defined as a concept describing class differences
- Race defined and explained as a socially constructed phenomenon

The review also categorizes the meanings and perspectives on racism and racialization with a discussion of, among other things, overt/covert and institutional/systematic forms of racism. The findings suggest that the biological concept of race is endorsed by most of the participants. Throughout this study I've also made an argument for and demonstrated an analysis of school finance from Critical Race Theory (CRT) perspective. I've stated that understanding race and racism as an intrinsic aspect of this country's history, institutions and systems bases the analysis performed in Chapters 4 and 5. Furthermore, the Latino Critical Race (LatCrit) Theory outlined in the literature review also provides a more specific framework from which to understand this group of participants and the discourses they utilize to make their arguments.

All the participants are Mexican American leaders of majority-Mexican American student populations in an overwhelmingly Mexican American region of the state. This study researches this marginalized group of participants by utilizing what some may term marginalized frames of analysis, CRT or LatCrit frameworks, and attempts to fill a void in the critical research of educational administration, politics and policy analysis. The goal is to not only study education policy that disadvantages Mexican American communities but to also improve educational leadership programs, educational policy analysis and social justice efforts by researching the politics and policy discourse utilized

by Mexican American educational leadership. The following questions were addressed for this purpose in this study:

1. What is the nature of the discourse utilized by Mexican American school leadership surrounding the school finance policy debate in Texas?
2. How do Mexican American school leaders utilize their own racial identity and lived experience in formulating political and policy discourse?
3. In what ways do Mexican American school leaders consider notions of race and racism as they examine the state of school funding in Texas?

Eight educational leaders were interviewed and observed during a four month period in the fall of 2003 and winter of 2004. Seven participants are current superintendents and one is a recently retired educational leader. All actively participate in the South Texas Association of Schools, a coalition of South Texas school districts organized to advocate politically and represent the interests of property-poor school districts in the Rio Grande Valley of Texas.

Summary of Themes

The first section of findings documents the participants' background, perceptions of political participation and beliefs regarding the existence of race and racism in education. These major thematic strands aid in addressing the second research question in which "who" the participants are and "what" framework they operate from within influences their discourse of school finance policy.

Trusting the Master Narrative

The research suggests that each of the participants have common profiles consisting of strong work ethic principles, childhood and professional experiences of

struggle, and familial support. They cite all these factors as influential in helping them to achieve their status of school superintendent and organizational leader. A majority of the participants were migrant farm workers as children and all have strong immigrant, working-class backgrounds. All attended South Texas public schools from the 1940s through 1960s during a time when overt, legalized segregation was commonplace, yet were able to attain undergraduate and graduate degrees as well as administrator certifications. All but one embarked on their professional careers in South Texas, specifically Rio Grande Valley school districts, and spent the majority of their tenures in this region of the state.

The role of family support is vital to the participants' understanding of their success. They each credit their family-taught work ethic and determination in "overcoming" their difficult backgrounds. Chuy Gutierrez, Manuel Lira, and José Ybarra specifically mention their mothers as the primary driving force in their academic success, however each of their families are cited as encouraging them to do well. Henry Tamez described how his parents had "not a day of education" but despite the hardships of work and life, they were able to provide a stable home life – one that required educational attainment. José Ybarra also speaks of his guardians – in his case his grandparents – who brought him and a sister to the U.S. when he was an adolescent. His grandfather insisted that he work in construction while he attended undergraduate courses, a skill he was able to capitalize on as a vocational arts instructor upon graduation.

Work ethic and migrant farm work experiences continually emerged during the interviews with the participants. Henry Tamez vividly reflected about the day he "realized" that he didn't want to be farm worker the rest of his life and described how the

stench of the cotton and pesticides during a hot, Texas day motivated him to succeed in school. Hector Sobrevilla also used an example in his life to reiterate that his work ethic attributed to his success as a professional. As a child he would help his father clean the middle school gym he attended although he always wanted to participate in extra-curricular activities. Because of a lack of money and necessity to work, he instead helped in the sweeping of the gym during the halftime of a basketball games. Mr. Sobrevilla later became the superintendent of the same school district in which his father worked as a janitor.

Each of the participants' narrative is powerful. None are shameful of their past, nor resentful of their upbringing. Rather, they are proud of their background, aware that it is their experiences that have shaped their success and identity. They find comfort in their belief that because of their determination and will, they were able to "make it." As Manual Lira stated, he visits migrant farm working programs throughout the country and speaks with these students with whom he feels a special kinship. In his presentations, he always informs them that they too can make it and "have a good job and earn good money" if they trust in the power of education. The work ethic he learned and the support he received from his parents is something that he also cherishes. As with the others, it grounds his perspective and informs his managerial style as he leads and represents his school district. As Mr. Tamez stated, this frame of reference which includes work ethic, determination and desire to succeed, is "embedded within him" and the other participants.

Although admirable and inspirational, their personal backgrounds of perseverance and success are conducive to a naïve framework of analysis, political leadership and administrative management. The framework clouds a broader, more critical view of the

economic and educational structures that limit Rio Grande Valley school districts and citizens from having equal opportunities for success. However limited this perspective may relegate contextual understanding of historical and current inequity, their political activism is not swayed from what they instinctively know to be the case – that Rio Grande Valley school districts require political representation and that an organization lead by a group of their own must advocate for their interests.

Creeping Toward LatCrit Political Activism

The participants demonstrate a duel understanding of and participation within the politics of education dynamic. They model micropolitical skills as school district administrators and practice macropolitical leadership as members of the South Texas Association of Schools (STAS). The majority of the educational leaders first characterized the "politics" of education as a local-level responsibility required of all administrators. However after further discussion, a broader view of political activity was endorsed and argued for as method of ensuring "voice" and organizing "clout" for their constituency. Although not advocated by the participants, their organization and advocacy teetered on Latino Critical (LatCrit) Theory in which the interests of Mexican Americans were represented, social justice goals were advocated, and counter-storytelling narratives were utilized (Haney-López, 1998; Solórzano & Yosso, 2001; Trucious-Haynes, 2001).

All participants first responded to questions of politics in education by describing local district, day-to-day operational duties. Four of the participants poignantly described how the "negative" or "dirty" politics detracted from the ability to make programmatic decisions based on students rather than school board member or local community

political desires. While two participants in particular, Manuel Lira and José Ybarra spoke of politics as the ability of administrators to formulate decisions based on ethical and moral foundations. Mr. Ybarra and Mr. Lira viewed their political responsibilities and/or dilemmas from the micro-level, more as a managerial style of leadership. Mr. Lira used an example of providing district policy rationales for a disenfranchised employee looking for a pay raise and stated that good leadership encompassed good communication skills. Mr. Ybarra similarly cited an example of suspending two star football players from a playoff game and having the ethical foundation to stand by his decision. His decision to sustain the suspensions further clarified his position that politics requires firm, sound decision-making. Both view the political as exhibiting effective leadership.

Chuy Gutierrez was the only participant who viewed "being a politician" as a positive term. Mr. Gutierrez mentioned his previous experience as mayor of his hometown as a positive experience and utilized an example in which his political acumen assisted him in becoming an effective leader. He explains how, passed over for promotion, he bided his time until another "outsider" administrator who was hired was not able to withstand the constant barrage of political challenges posed to him by local school board members. Mr. Gutierrez was one of the few participants that positively characterized political acumen as a positive trait for educational leaders and embraced the "politician" moniker.

However prevalent negative connotations of local-level politics are, participants nonetheless strongly affirm their beliefs in forming and participating in their coalition of South Texas school districts. Forming an association with the sole purpose of representing Valley school districts is seen as necessary by all the participants. Their past

experiences with misrepresentation require the formation of the STAS and the tension that exists with other statewide educational organizations is introduced by several of the participants. Andres Rios describes how he felt personally slighted by the executive director of Texas Association of School Administrators (TASA) for the lack of respect he showed to him and other administrators from the Valley, while Chuy Gutierrez and Henry Tamez communicated their frustration at not being "taken seriously" at statewide meetings. The final incident mentioned by several of the participants was the support that TASA provided to legislation that would have clearly harmed the financial health of most if not all STAS member districts. As described by Richard Muñoz, this action prompted him to resign his representative position with the organization although he was only representative of Mexican descent.

Each of the participants believes that political participation at the state-level is required of school superintendents. If not an active participant, their constituencies, regional and local, will be negatively affected. The STAS was created for reasons exemplified by TASA's support of school finance bill and its purpose is to advocate for school finance legislation that will benefit their members. The association consists of districts with "demographic similarities" and was created to provide "voice" and "political clout" for their members. As explained by Henry Tamez, the need for the state's political leadership to hear one, unified "voice" was a primary reason for the groups formation. Dr. Treviño further asserts that the superintendents in the Rio Grande Valley decided that rather than having several, individual school districts speak about issues affecting them individually, they could wield more political clout by forming an association that represented the group.

The concept of interest convergence is undertood and utilized by all the participants. In the struggle to defeat the Republic-sponsored legislation, members of the STAS found it beneficial to form coalitions with poor, majority-White, Republican-controlled school districts. They recognize the ability of school administrators from these districts to sway their legislators' opinions on legislative issues. Mr. Muñoz blatantly states that if it were not for their opposition to the bill in question, the legislators would have voted for the elimination of "Robin Hood," but because it affected their constituents negatively they voted against it. Mr. Ybarra also notes that showing poor, majority-White school districts a "finance model" of how a proposed changes to the system would affect them served as a motivating factor in gaining their support. Mr. Rios states that majority-White districts and their administrators began to support their position once they realized that "maybe those brown boys have something." The participants recognize that formulating a successful political strategy based on interest convergence is essential to protecting their position and further realize that if it were not for the affect on majority-White, rural, poor school districts, the legislation to end equalized funding would have been passed.

The majority of participants do not view the organization as one based on the representation of Mexican Americans although they agree that "demographics" provide a level of similarity that binds the group together. Nonetheless, the superintendents are creeping toward a LatCrit political activism in which they understand the linking of interest convergence strategies, formulation of an association with the purpose of protecting their marginalized community's interest, and utilization of their organizational clout to inform and shift the dominant group's policy and argument. They instinctively

realize that without forming their association they would be left out of the political process. However, discussing race and utilizing a racial dicourse is not promoted by the majority of the participants. As they see it, it would not benefit the group politiclly and as Mr. Ybarra states, it would only serve to "turn off" policy and decision-makers.

Running from a CRT Analysis

Most of the participants support a narrowly-defined view of race and racism. Considering how they and their families experienced overt and legalized forms of racism during their childhoods, they do not understand racism today as "real." In a discussion of the racial hierarchy instituted by the school finance system, the participants are more comfortable defining the phenomenon as class-based or a problem of "economics" inequity. Finally, a majority of the group believes that inserting a discussion of race and racism does not assist their struggle for equity in school finance but rather hinders a "moving forward" of the reform process.

As summarized in the first section of this chapter, each of the participants have strong fundamental beliefs about work ethic and experienced life-altering racist and discriminatory events throughout their childhoods. However, six of the eight participants are not receptive to a discussion of race and racism. Some appear to be conflicted by their perceptions of race and racism in schooling and their powerful narratives of overcoming extreme poverty and discrimination, while others disregard the existence of racism and instead lay the blame of underachievement in education on the reluctance of individuals to "choose" success. They explain how determination and struggle rectifies the ills of racism. Hector Sobrevilla describes how he was subjugated to the "remedial" school despite scoring well in standardized tests because he arrived late for the school

year due to his family's obligation to migrate work. Richard Muñoz begins his interview by explaining how he attended an old, wooden, segregated school while the all-Anglo school was constructed of brick. And Manuel Lira remembers that despite growing up during the Chicano Rights Movement near the headquarters of La Raza Unida Party, never did he remember Mexican Americans holding leadership positions with the city or county governments or the school district's central office. They endorse the notion that working hard, learning to "work" the system and having the desire to achieve is a better explanatory variable of inequity, poverty and academic underachievement.

Most of the participants understand racism narrowly, defining it as an individual act committed by a "racist" individual. José Ybarra states that he is sure that some "rednecks" and "skinheads" exist but they are not commonplace, while Joe Treviño describes racism as occurring from "both sides." In our discussion, Dr. Treviño responds by "blaming the victim" for not wanting to participate in diverse experiences and discriminating against other groups of people. He advises Mexican Americans to experience other cultures by not relegating themselves to their comfort zone. Manuel Lira also describes how racist individuals exist but that negative attitudes are changing because of the shifting demographics of the state. His uses an example of district-to-district cooperation to support his conclusion that racism does not exist as it did in the past. With the increased enrollment of Mexican American and Mexican-immigrant student populations, White administrators are adapting to the changing demographics by learning from majority-Mexican American school districts and revising their strategies.

The participants also have a desire to describe historical and current inequity as a problem of "economics" rather than institutional or systemic racism. They view the

ability of North Texas school districts to attract corporations to their regions as a natural but evolving phenomenon. They foresee a time when the shifting demographics will require the state's leaders to take notice of the Rio Grande Valley and the "sleeping giant" that its labor force and economic system represent. Mr. Ybarra reiterates his contention that "putting the Mexicano issue up front" is not politically viable, but rather utilizing a class-based or economics-based strategy will better assist the association. The superintendents that denied the effectiveness of a racial discourse would rather "work from the inside" rather than play the "extremist" role that racial politics sometimes requires. Introducing a racial discourse is not conducive to building coalitions and alliances with other groups of people fighting for the same issues.

The only two participants that understand race and racism from an institutional or systemic perspective are Chuy Gutierrez and Andres Rios. Mr. Gutierrez describes Mexican Americans who would rather side with the dominant group as "coconuts" and feels that many still exist within the leadership framework. He acknowledges that he is comfortable with introducing a racial discourse and provides several examples of being relegated to that of an "outsider" for speaking out on a contentious issue. Mr. Rios similarly describes instances in which he has been ostracized for inserting race and racism into discussion and explains that the need for Mexican Americans to avoid "discomfort" as a motivating factor in the refusal to have an aggressive, racial discourse. Both participants see this avoidance as a political mistake and believe that the dominant, majority political leadership will only capitalize on the lack of critical thought and action.

Summary of Policy Analysis

A critical race analysis of school finance policy was conducted in an effort to provide contextual background and quantitative analysis of the state funding system in Texas. In reviewing three chapters of the Texas Education Code (TEC), I found that majority-Mexican American school districts along with STAS member and the study's participants' districts are negatively affected disproportionately by the school finance funding formulas. State-sanctioned inequity is codified in statute, the "substantially equal" legislative language approved by the Texas Supreme Court advantages property-wealthy, predominantly-White school districts, while facilities funding re-institutes a form of the vast inequity that was present in school finance laws prior to the Edgewood cases.

Property Values Institutionalize Racial Hierarchy

After a federal Supreme Court case, four state Supreme Court judgments, numerous legislative committees and countless hours of advocacy work by communities, parents and non-profit organizations, the primary variable determining school district funding continues to be a districts' property value. Local district funding is predominantly determined by its "property-wealth" not the income-level or socioeconomic status of its students. Based on the number of students, a district's property valuation, and its willingness to tax above the minimum $.86 level, a district will generate a total state and local cost of education. The percentage of state and local cost is determined by the wealth level – the higher the wealth, the less the state share and higher the local share will be. The inverse is true for "poorer" school districts.

TEC, Chapter 42 is the primary statute establishing funding for districts considered property-poor. The state sets a basic allotment amount in the first tier of

funding and a guaranteed yield for the second tier of funding. Legislative appropriation determines the basic allotment while court opinion requires the majority of the state's students to be within the equalized system or Tier II, guaranteed yield funding system. Districts are limited to a combined $1.50 tax rate for the maintenance and operation of a school district. Facilities funding is calculated in a third tier of funding.

Because school districts with little or no local tax capacity must rely on the legislature to appropriate sufficient funds for the basic allotment and guaranteed yield, they are often disadvantaged by the historical, conservative nature of the legislative body. As was shown with an analysis of the 50 poorest school districts in the state, majority-Mexican American school districts are most disadvantaged by this type of system. Conversely, the 50 richest school districts are more likely to be majority-White and thus advantaged by a system that relies so heavily on a valuation of a district's property. Analysis of the seven participant districts indicates how their reliance on state funding is more acute. They rely on state funding for their basic maintenance and operations budgets and would be affected severely by an elimination or reduction of state funding. If left to generate funding solely from their local tax bases, a return to pre-Edgewood inequity would occur.

"Robin Hood" is "Substantially Equal" Not Equitable

The infamous "Robin Hood" method of financing public schools in Texas is the second aspect of the TEC that was analyzed. TEC, Chapter 41 defines "property-wealthy" districts as those with a wealth per weighted average daily attendance (WADA) calculation of $305,000. If a district is able to generate $305,000 or more property wealth per WADA, it must select one of five options to "share" their wealth. The choices

include sending funds to the state for distribution, entering into agreements with property-poor school districts, and/or annexing a portion of their property to a property-poor school district in an effort to reduce the amount generated. The "recapture" level is determined every biennium by the legislature and has never been fully equalized (i.e. a level in which all school districts would be limited to the same amount of wealth per WADA).

The political rhetoric exhibited around the school finance debate is one that characterizes "Robin Hood" as "stealing from the rich districts to give to the poor" and also leaves the impression that rich districts are disadvantaged by this system of redistribution. However, because TEC, Chapter 42 guarantees up to $271,400 per WADA and TEC, Chapter 41 guarantees that districts may keep up to $305,000 per WADA, a built-in inequity has been codified in the statute. The constitutional "gap" as found by the Edgewood IV court decisions allows for a $600 per student difference. This "gap" translates to the Tier II guaranteed level and Chapter 41 "recapture" levels noted above. The majority of students affected by TEC, Chapter 41 are Anglo students and amount to minimal number of the total state student population. The districts fighting for an elimination of the "Robin Hood" are represented by key members of the legislative leadership and disproportionately represent the North Texas region of the state. Not surprisingly, the poorest school districts in the state are disproportionately from the Rio Grande Valley of the state.

As demonstrated by the quantitative analysis of the STAS and participating districts total revenue, the majority-Mexican American school districts generate less total state and local funding than do seven of the most wealthy school districts in the state.

Although measured by the same state accountability system and held to the same standards, the districts are left lagging behind on the ability to raise equal funds. The discourse surrounding "Robin Hood" paints a picture that when scrutinized does not merit the critique. The court has approved a standard of inequity while the legislature has adopted an education code that manifests this standard.

Facilities Funding Clouds Inequity

Facilities funding is the final aspect of school finance policy addressed by the Supreme Court opinions. In the Edgewood IV majority opinion, justices concluded that if a state funded facilities program was not implemented in the near future, the constitutionality of the system would be in question. Most school districts in the state utilize the bond markets to acquire funds for constructing, renovating and maintaining school facilities. Prior to the state facilities programs, poor school districts had difficulty raising sufficient local tax dollars to meet their debt obligations because of their minimal tax bases. Therefore, antiquated school facilities lapsed into further disrepair and overcrowding was dealt with using "patchwork" methods (i.e. portable buildings).

The state instituted two state funding programs in an effort to assist districts with meeting their debt obligations. The Instructional Facilities Allotment (IFA) and the Existing Debt Allotment (EDA) were created as a result of the Edgewood IV majority decision. First created in 1997, the IFA program provides districts issuing debt for the specific purpose of constructing or renovating "instructional" facilities an opportunity to receive state assistance in repaying their bonds. Districts must submit applications prior to entering into their debt, must compete with other applicants and are awarded based on property wealth. In all but two of the first six rounds did the legislature appropriate

sufficient funds to meet school districts'demand. Poor and majority-Mexican American school districts are advantaged only by the fact that the poorest school districts are awarded first.

The EDA was implemented by state statute in 1999 and permits districts with "existing" debt (i.e. as of August 31, 2001) to qualify automatically for state funding, regardless if the bonds are for "instructional" purposes or not. Districts are not required to apply and compete for funding unlike the IFA, and sufficient funding to fund all districts with "eligible" debt has been appropriated in the past two legislative sessions. Wealthier districts are able to benefit from this program disproportionately because they more often are able to issue debt without the assurance of state assistance. In other words, they issue debt with the hope that the legislature will set an "eligibility" date beneficial to them. For those districts not able to pay for bonds without first receiving assurance of state assistance, the ability to benefit from the higher yielding EDA program is not an option and instead have to hope for appropriations in the historically-underfunded IFA program.

Majority-Mexican American, STAS members and participating districts most often benefit from the IFA program rather than the EDA program. The legislature appropriates more funding in the EDA program benefiting districts that are wealthier and able to afford bond elections independently. Moreover, the state does not have "recapture" provisions for interest and sinking fund tax collections. In effect, this allows wealthy school districts to set low tax rates and raise enormous sums of money in an effort to build facilities, athletic fields, auditoriums and performance arts halls. Facilities funding programs re-institutes inequity with the school finance system. The

implementation of two facilities programs clouds a discussion of equity and creates an illusion of fairness in state appropriations.

Summary of Political and Policy Discourse

The sections on private declarations and public advocacy address two of the study's research questions – what is the political discourse utilized by the participants in the school finance debate and does the discourse utilize a racial analysis framework. Privately, the participants inform me that the system is unfair, does not provide sufficient funding and is further relegating their districts to "survival" status. Publicly, they contend that the legislature should keep the current system and that acting to eliminate it would not benefit their students. The participants resist returning to a time where vast inequity was present yet they also do not advocate for a more socially just and "equitable" system of finance. They do not employ a critical race frame of analysis and refute the ability of racial discourse to politically advantage their group or constituency. By arguing for the status quo and denying a critical framework, they further disadvantage themselves politically.

Ubiquitous Inequity and Insufficient Funding

The STAS member districts are located along the border with Mexico, each have high percentages of low-socioeconomic status (SES), limited-English proficient (LEP) and Mexican American student populations. They rely heavily on the state for providing funding paying teachers, maintaining facilities and providing instructional materials. The state funding has lifted their districts to a funding level never before seen in the state, however, it remains insufficient.

All the participants state that their districts are just "managing to get by" and are only able to provide "the basics" in their instructional programs. They contend that funding does make a difference in providing opportunities for success, refuting research by nationally-renowned economists and policy analysts that "money doesn't matter." Both Hector Sobrevilla and Manuel Lira caution me to examine the hidden message used by opponents of increased funding or equity, they request that I understand that "money is good enough for them, but not for us."

The superintendents believe in a more holistic definition of education that includes both a regular and enrichment academic program but also realize that the political leadership and opponents of equity are attempting to narrow the definition of "academic success" in an effort to cut state costs. Several of the educational leaders cite research which supports how extracurricular activities, physical education, art and music produce well-rounded, critical-thinking students. Each of the participants communicates deficiencies in their current enrichment needs. Manuel Lira states how he would like to build a fine arts facility so that band members do not have to practice in the cafeteria. Hector Sobrevilla would like to have a fine arts feeder program but can not afford the teachers and Henry Tamez would like to provide a mariachi band class. None can afford to do it.

While they lack for sufficient funding, the participants are cognizant that the system has improved for the better since the "bad ole' days." Each were active in leadership during the pre-Edgewood days when, as Mr. Sobrevilla states, "we couldn't even by computers." Therefore, the political movement to eliminate "Robin Hood" poses a great threat to their district's financial health and limited method of operating. As

demonstrated by the policy analysis section, each of the districts would not be able to operate with an end to the system of recapture. Most would become insolvent without major state assistance.

Political Disconnect from Reality

The participants state that inequity and insufficiency exist even with "Robin Hood" and they communicate a fear of a lower-standard of "adequacy" promoted by "Robin Hood" opponents. I, therefore, delved into the question of whether "Robin Hood" is a hero, thief or accessory. Some understand the rich school district's perspective of considering "Robin Hood" a thief, others believe the system to be an accessory and a few celebrate the system as a hero. Multiple "Robin Hood" definitions exist yet a critical, analytic framework is nonexistent.

The participants have a lack of critical frameworks when reviewing the "Robin Hood" system of finance, specifically the inherent, racist nature of the over reliance on property values in generating state and local funds. Andres Rios states that he does not "begrudge" rich districts what may be their "families' hard work or birth right" and believes that poor districts should "want to be like Highland Park, not want to take away from Highland Park." Joe Treviño also can "understand the rich school districts perspective" or anger directed at a system that recaptures their local funds.

None of the participants believe that a system in which full equity can be achieved is viable. Although they state that their districts can only provide "basic" services, that inefficiency does not exist and that local enrichment is not possible, none of the participants strongly advocates fighting for a system in which no "gap" exists between rich and poor school districts. However, the participants do believe that adequacy is a

political term that can be set too low to their detriment. It is the shift to an adequacy argument that raises their concern the most and provokes strong words of resistance.

Finally, the participants refuse to implicate the school finance system's over reliance on property values as inherently racist. Only two the participants, Henry Tamez and Chuy Gutierrez, state that "they've known this all along" and "hell, yes, use this" when I share the list of 50 poorest and 50 richest school districts broken down by racial demographics. The others are less impressed, denying its significance and ignoring its utility in the political discourse. Andres Rios sarcastically suggests that the data shows "how we refuse to move to other parts of the world or state" while José Ybarra and Hector Sobrevilla continue to rely on an argument based on class or economics. Joe Treviño admits to skirting my question regarding race and racim and responds that the state is changing demographically and politically although the change may "take time."

Public Contradictions

Two legislative committee hearings were analyzed to provide a snapshot of STAS leadership discourse on the issue of school finance. In these meetings, three of the study's participants provided testimony on bills seeking to eliminate the "Robin Hood" system of finance. Their testimony does not mirror what was stated privately, is ahistorical, lacks a critical analysis of current funding and employs an accomodationist style of public discourse.

Contradicting what was privately stated, the participants' testimony fails to communicate the current status of their districts' operational budgets. Most all participants privately stated that the funding provided to them currently was insufficient to meet the rising state accountability performance standards and the increasing

enrollment of students, yet Richard Muñoz, the sole STAS witness in the first legislative hearing, did not communicate the dire state of finances for Valley school districts. Rather he thanked the legislators for the "equity and adequacy" already present within the system. While the participants privately stated that inequity, unfairness and insufficiency was rampant at the local level, José Ybarra and Joe Treviño also ignored this reality and did not utilize this discourse publicly in the second of the two legislative hearings.

All three STAS representatives testified without providing the rich historical context of inequity in state funding. Despite the legislatures historical "foot-dragging" on issues of equity and school funding and its continued fostering of a "gap" between rich and school districts, Dr. Treviño thanked the chairman of the committee for his "courageous" efforts in providing additional funding for the next biennium. He did not critically comment on the widening of the "gap" between rich and poor school districts and failed to inform legislators how the bill would codify further inequity. The chairman of the committee and the sponsor of the bill to eliminate "Robin Hood" provided challenges to their testimony as a "fear of the unknown," but rather than providing testimony from their extensive experiential and professional knowledge, the participants agreed to his contention that their negative testimony was based on this "fear."

Another contradiction exemplified by the public testimony of the STAS members was the method by which they argued to "keep what we have" regardless of the fact that what they currently generate in state and local funding was deemed as insufficient by each of the administrators privately. This strategy to "not go back to the bad ole' days" failed to insert conflict into the discourse and relied on an accomodationist and uncritical frame of analysis. Although the legislature has shirked its constitutionally mandated

responsibility to provide for an "efficient diffusion of knowledge" as evidenced by the long Rodriguez and Edgewood court histories, the participants did not challenge the legislators on their move to eliminate the product of their long struggle.

Finally, the participants that testified yielded their moral stance and failed to provide visionary leadership in the debate over school finance reform. Their progressive and critical understanding of the politics of school finance as exhibited by the forming of the STAS, is absent in there consideration of school finance reform. Their position contradicts their reasoning for political organization – an Anglo-dominated, statewide organization was failing to meet their needs thus they created their own organization in which they could protect the interests and argue for positions on behalf of their constituency. A critical race policy analysis is replaced by a need to be part of the "game." Deleting a racial discourse or analysis aids in their desire to gain admission to this "game" but disadvantages them in arguing for meaningful, equitable reform.

Implications

Implications for Practice

This study has clear implications for the practice of political organization, interest group formation, and educational leadership advocacy. Today, one of the educational leader's major responsibilities includes the "political." Its importance becomes magnified in a state as large, diverse and complex as Texas, where the organizing and advocacy nature of interest group formation is essential to the protection of a group's values and interests. Similarly, other states, localities and communities will have to contend with this conflict in an era where state appropriations are limited and demand for "outputs" is expected. Preparing educational leaders for this fact provides unique

challenges for educational administration scholars but ample opportunities for improvement and research in a field that relishes the linkages between scholarship and practice.

The need for educational programs to develop and implement courses and training in the politics of education and educational policy analysis takes on a higher priority in this context. As demonstrated by the participants of this study, not only must future educational leaders understand the local level context of political leadership, they also must be cognizant of the statewide political context and dynamic. This skill carries more weight for leaders of marginalized communities. As exhibited by the participants of this study, the lack of critical analysis and/or leadership complicates their political leadership and strategies. A return to social justice goals and advocacy is necessary to protect their interests.

Finally, educational administration programs must better prepare leaders to contend with the varying issues and values promoted in the area of school finance policy. Understanding the practice of school finance – local budgeting, tax rate policy, bond elections – is vital, however, without the ability to understand and advocate for proposals beneficial to one's district at the state-level will endanger current and/or future funding.

Implications for Theory

The study has implications for politics of education theory. An argument for a multi-perspective analysis of politics in education and more specifically, for the use of Critical Race Theory (CRT) analysis of politics was demonstrated by this study (López, 2003; Scribner et al., 2003). The participants argue from a meritocratic, color-blind framework but practice a form of LatCrit political participation described by Trucious-

Hayes (2001) and Haney-Lopez (1998). They form a coalitional group, understand the tension between Anglo-dominated state organizations and chose to advocate for their constituency. However, the extent to which this theoretical framework is valid necessitates additional critical reflection and scrutiny.

A CRT policy analysis is demonstrated in the first section of Chapter 5. Majority-Mexican American school districts are disproportionately disadvantaged by the current school finance policy and a further examination of school finance history clarifies the predicament that STAS member districts are thrust into. The use of a CRT analytical framework has implications for a broadening of the current traditional forms of research that limit findings, proposals for, and solutions to the problems of marginalized groups, students and communities (Brady et al., 2000). This study also has implications for an increased use of qualitative research in the courts (Parker, 2003) and legislative process. I contend that the narrative data should highlight the political strategy promoted by the STAS membership and inform their notions of LatCrit political organization in their efforts to organize and advocate for social justice goals.

Implications for Policy

School finance policy is one of the most contentious issues facing educational leaders, policy analysts and researchers. Whether money matters and how efficiently districts are utilizing their monies are two strands of research that continue to thrive in the literature. This study has implications for researching, teaching and practicing school finance in a different light. Understanding school finance equity, adequacy, and fairness are at their core, politically-defined concepts.

While this research has implications for approaching an often technical subject matter from a qualitative perspective, it also argues that all educational policy – state, local and campus-level – should attempt to explain and describe policy effects in a similar methodological manner. Completing analysis on, for example, high-stakes testing, bilingual education, drop-out policies, and special education from these perspectives will benefit marginalized groups as well as broaden the spectrum of the literature and educational research. The methods provide an alternative to the traditional frameworks of conducting "policy analysis" and add practice-oriented interpretations to the research field.

Implications for Future Research

This study utilizes school finance policy as a window from which to view the linkage of politics, policy analysis and racial discourse at this moment of the Texas school finance debate. Although it is not generalizable because of its limitations in, among other things, participant selection, it nonetheless provides implications for further study of educational policies and politics at macro and micro-levels of analysis.

A future research agenda is laid out by this study. As already indicated, policy research has rarely been conducted using a CRT or LatCrit framework of anlysis. The instances in which school finance policy and politics has been researched from this persepective is also lacking. Opportunities to broaden the scope of this project are first on the list to accomplish. Furthermore, the lack of female leadership in this group of educational leaders is problematic. Understanding why women have been excluded from this political group provides further opportunities at self-critique and improvement as a socially just organization. Finally, the study has implications for two areas of study – the

lack of critical introspection exhibited by the group and the use of traditional forms of testimony and political organization strategies – in expanding the understanding of this marginalized group of educational leaders.

Conclusions

School finance policy in Texas has been actively challenged in the courts and legislature since the 1960s. As indicated by recent court and legislative action, a new round of challenges to the current "Robin Hood" system of finance is underway. Economists continue to argue the significance of funding to "academic success," the ability to "efficiently" fund a system that measures input and output measures, and the method of calculating an "adequate" cost of education. Like the highly-contested political process, this trend will also continue. Because every community and region of the state provides public education and most every citizen has experiences in the public school system, political leaders benefit by designing their educational platforms to address among other issues, school finance policy. Along with increasing student enrollment and the shifting of the tax burden from the state to the local level, school finance policy will only continue to fuel interest, policy positions and political movements on a macropolitical level.

There exists a movement to dismantle the "substantially equal" form of equity currently in statute. The history of funding inequities is well-know by majority-Mexican American school districts. These marginalized communities are justified in their concern of the move toward "adequacy" or a level of funding deemed to be appropriate by the conservative political establishment. It was these parents and community members who instigated the improvements made over the last thirty years. The brunt of political

resistance and activism will once again fall on their shoulders. If organizational complacency exists and an uncritical frame of analysis is utilized, the ability to succeed politically and argue for equity, fairness and sufficiency is hindered.

As demonstrated by the participants of this study, a denial of a critical race analysis of school finance policy is widely practice even among the Mexican American community. Starting with a narrowly-defined concept of race and racism in which individual-level, biologically-based definition is endorsed; the participants fail to view the systemic and institutional racist nature of the "Robin Hood" system of school finance. The educational leaders endorse a color-blind, meritocratic system of success and trust in their powerful narratives of determination, work ethic and success. Concurrently, the participants refuse to critically analyze other state education policy that has proven to be detrimental to Mexican American communities (i.e. the high-stakes accountability system).

In the same manner in which they fail to embrace a CRT framework of policy analysis, the study participants understand that organizing a political organization is essential to protecting their constituency. They exhibit forms of a LatCrit political organization framework that embraces tenets from the both the CRT and LatCrit frameworks. Coalitional organizing, interest convergence principals and an advocacy for their Mexican American communities are positive steps toward the LatCrit and CRT perspective. Although they deny the importance of race and the need to discourse racism, they practice this watered-down version of LatCrit political organization effectively.

For all its faults, the Chicano Rights Movement positively altered our society's system of democratic representation. They critiqued the Mexican American community

for its problematic views on racial identity, political activism and conflict and resistance and endorsed alternative frameworks to view politics, policy and social phenomenon. Most of all, they developed stronger, more capable leaders for Mexican American communities, politics, business and educational institutions. Now that the state has reached a point in history where a plethora of Mexican American educational leaders exists, the next critical question becomes – what kind of leaders are being developed and how are they practicing their leadership?

The fact that the Mexican American educational leadership in this study denies a CRT analytic framework is problematic; however, positive findings of LatCrit political organization also exist. I endorse using the Latino Critical Theory framework in forming political organizations, conducting policy analysis and advocating for social change. A racial discourse in the political process and racial analysis of school finance policy are vital in this new era of neo-conservative litigation and legislative proposals. If Mexican American organizations refuse to use this discourse, they in effect disarm there most capable political weapons prior to the confrontation and conflict that serves democratic government so well. Inserting discomfort and conflict into the political dynamic should be viewed as a positive method of informing the opposite view and strong resistance.

EPILOGUE

Finding Driscoll in Fort Worth

In the fall of 2003, I defended my dissertation proposal and advanced to doctoral candidacy. Exhausted and planning my participant selection and interview schedule, I took some time off to fulfill a promise I made the night I viewed the Dr. Garcia documentary. After some further research, I located the Hernandez v. Driscoll CISD case files at the National Archives depository in Fort Worth. That September, I took a day off from work and left Austin at 4:30 am to begin my research at the eight o'clock opening time.

The three-hour drive to the Dallas-Fort Worth area provided ample time for me to mentally review the story that my mother had shared with me many years before. Having only completed my research proposal, I had not yet fully contemplated how this personal story interconnected with my current research agenda. I had not reflected upon the epistemological and methodological questions that bridged the Driscoll case, my research perspective and my current research topic. Why was I making this trip to Forth Worth? What purpose did it serve my research agenda? How would it influence the type of researcher I would become? Although responses to these questions would not become formulated until after I completed my study, their relation to my personal history, social justice goals, and future research agenda became evident as soon as I began to read the court transcripts.

The Driscoll case demonstrates how an institutionalized racist system is justified by a majority group, further relegating Mexican Americans to the bottom rung of educational opportunity. The inexistence of the Driscoll case history in my childhood

upbringing and early academic training demonstrates how the void of historical context and critical interpretation can cloud and stymie the development of a critical consciousness. Its insertion into my research perspective demonstrates how it served as a catalyst, influencing my political and scholarly activism. Finally, examining the school finance system from this critical, historical perspective, as I did in this dissertation, demonstrates the degree to which the struggle for equality and fairness in education policy has not positively shifted in the last generation. Although overtly racist and discriminatory conditions have certainly improved, structural and hierarchical racist institutions such as the school funding and accountability systems in Texas have not.

The Parallels: Forty-Seven Years Later

When I arrived in Fort Worth, I found two boxes of attorneys' motions and briefs, court opinions and transcripts of the testimony given in the two-day trial. As I read the court briefs and transcripts much of current-day political and policy discourse emerged from the pages. Although the evidence and documents had been virtually untouched for almost fifty years, the arguments, issues and policies discussed in that South Texas court room in 1956 had not substantively shifted. Defendants of the racist and segregated educational system and schooling processes blamed the Mexican American parents who "failed" to teach English to their children. The Spanish language was undervalued, considered a cultural deficiency and cited as a reason for student "retardation." Bilingual education policy, both immersion and segregation strategies, were discussed as methods for eliminating the Spanish language from the legitimate academic curriculum. And, not unlike the common perception that a high-stakes testing, accountability system guarantees the effective education of school children, the case exhibits the extent that

testing is relied upon to measure student aptitude prior to the institution of tracking mechanisms.

The plaintiffs, lead by attorney James DeAnda,[50] called twelve witnesses during the presentation of their argument. The witness list included Gordon Green, [51] the school superintendent who testified that in twelve years he had never had a Mexican American student entering Driscoll schools who could speak English sufficient enough to place in an all-White classroom, justifying his policy of segregating the Mexican American children from the White children. It was not until the mother of Linda Peres, a new student from a neighboring city, challenged the district policy and sought the assistance of the American G.I. Forum that Mr. Green relented in placing her in an all-White classroom. Mr. Green refused to take responsibility for his district's overt method of segregation.

> **Mr. DeAnda:** Other than the Peres child, you have never placed any Latin child in the Anglo sections in the first or second grade, is that correct?
>
> **Mr. Green:** That's correct.
>
> **Mr. DeAnda:** In the twelve years that you have been there.
>
> **Mr. Green:** Well, yes. But you recall, of course, the first few years there, why, I inherited, we will say, a different system to what we are using now.

[50] James DeAnda was the first Mexican American federal judge, appointed to the Southern District of Texas. Judge DeAnda served for over twenty years on the bench and participated in another notable Hernandez case, Hernandez v. State of Texas in 1954.

[51] Testimony by Gordon Green is found in Hernandez, et al. vs. Driscoll CISD, Reporter's Transcript of Proceedings, Volume I, RG1, Box 162, pgs. 68-69.

The district's brief[52] answering the charges filed by the Mexican American parents also abdicated any responsibility for this phenomenon and instead, relied on shifting the blame to the Mexican American community for refusing to speak and teach English to their children. In their brief, the district stated (pg. 5):

> For reasons over which these defendants have no control whatsoever, such reasons consisting principally of the failure and refusal of the parents to teach their children the English language and to speak the English language in the home, the great majority of the students of Mexican descent or other Latin-American descent, upon becoming of school age and entering school for the first time, are found to speak no English and to understand no English when spoken to them.

As the superintendent and defense brief demonstrate, the "blaming the parent" tactic was the district's primary justification of its processes. Albesa Hernandez,[53] the only parent to testify, bore the brunt of the defense attorney's attack. The mother of two students, she was the second plaintiff witness called. The defense attempted to discredit her testimony by alluding to her divorce and experience as a single mother. The defense attorney focused his first line of questioning on her children's "inability" to speak fluent English.

> **Mr. Davis (defense attorney):** Now, you say both of those children spoke English when they first entered Driscoll School?

[52] Hernandez, et al. v. Driscoll CISD, Civil Action File No. 1384, Answer of Driscoll Consolidated Independent School District, and R.C. Little, J.W. Davis, Cecil Catlett, B.H. Pfluger, Clyde Kastner and Nelson Brown, as Trustees, and Gordon Green, Superintendent, filed December 15, 1955, by Allen Davis, lead attorney for Driscoll CISD.

[53] Testimony by Albesa Hernandez is found in Hernandez, et al. vs. Driscoll CISD, Reporter's Transcript of Proceedings, Volume I, RG1, Box 162, pgs. 96-113.

Mrs. Hernandez: Well, they couldn't speak all English, but they knew enough to get by. I had made sure that they know enough English to get by in school in those first years.

Mr. Davis: Now, you were asked the question if they could speak English and you didn't qualify it. Then you said they could.

Mr. Hernandez: That is what I mean.

The line of questioning shifted to the witness' marital history. Mrs. Hernandez' courage and unabashed pride was not influenced by the defense attorney's tactics as Mr. Davis attempted to insinuate that Mrs. Hernandez' multiple marriages resulted in her sons' "insufficient" English.

Mr. Davis: How many times have been married?

Mrs. Hernandez: Twice.

Mr. DeAnda: I object to that.

The Court: I don't think it hurts.

Mr. Hernandez: I am not ashamed of it one bit.

Another parallel to current-day political and policy discourse centers on the testimony regarding Spanish language utility and significance. The plaintiffs' expert witness in regards to this subject matter was Dr. George Sanchez, while the defense relied upon the assumption that Spanish fluency negatively correlated to intellect and aptitude. Much of bilingual education policy discourse today pits advocates of those that place a high value on the Spanish language acquisition as good bilingual education policy against those that contend that students should be segregated from the onset of their educational experience in an effort to immerse them in the English language, eliminating their

Spanish fluency in the process. The Driscoll defendants argued that Spanish-speaking students were intellectually "retarded" because they did not speak English as their native language. Evidenced by the defendants' countersuit,[54] they ask the judge to require parents to speak English in the home. The countersuit states (pg. 2):

> There exists a custom, practice and usage among a large percentage of such parents, even though they are citizens of the United States, of speaking only the Spanish language. Even though some of the parents in said class may not be able to read or write the English language, a large percentage of them are able to speak and understand the English language to such an extent that they are capable of carrying on an ordinary conversation in the English language. The failure and refusal of parents in said class to speak the English language in their respective homes and in the presence of their young children is the principal reason why their children upon entering school are unable to speak the English language.

The "failure and refusal" cited by the defendants is the primary rationale or justification for the discriminatory processes instituted by the district. Although the defense argues that it is the parent's responsibility to instill English-speaking skills in their children, they contradict their argument by stating that the parents have no right to demand equal educational opportunities of the district officials. The countersuit states (pg. 3):

> The minor plaintiffs herein are not of sufficient age and maturity to understand the matters involved in this suit, and this suit has therefore been in fact instituted not by or at the instance of said minor plaintiffs but by the Parent Plaintiffs, who

[54] Hernandez, et al. v. Driscoll CISD, Civil Action No. 1384, Counter-Claim by Defendant Driscoll Consolidated Independent School District, filed February 22, 1956.

> in fact have no right as parents to control the course of education of their children in such a manner as to impair the interests of pupils who do speak and understand English upon entering school. It is the duty of the parents to cooperate with the schools and the teacher…

Finally the district's countersuit asks the judge to enjoin the plaintiffs from speaking their native language. Similar to narrow, conservative ideology that devalues multiculturalism and promotes a protectionist agenda, the countersuit states (pg. 3):

> Parent Plaintiffs and all the members of the class they represent should be required by mandatory injunction, to the extent of their ability, to speak only the English language in the presence of their children who are of pre-school age or who are in the elementary grades, both while school is in session and during the summer vacation months, and such parents should also be required by mandatory injunction to prevent their said children from playing and associating with other children and persons who do not speak the English language. If, during the summer vacation period of the three months, Spanish is spoken in the home and spoken by those with whom the children associate, the children forget much of the English they have learned in their first and second school years, and they are further retarded thereby and the expense of the operating the school system

The defense argument that the judge institute a "mandatory injunction" prohibiting the speaking of Spanish to their children and to further restrict them from "playing and associating" with children who speak Spanish parallels the English Only movement, anti-immigrant legislation successful in some states and the continual xenophobic educational policies advocated by some conservative scholars and many state legislatures.

In the end, the judge ruled in favor of the Mexican American plaintiffs and against the district's discriminatory practice of relegating Mexican American students to multiple years of first grade based solely on their Spanish surname. However, he also stated that if standardized tests that measured "ability" were instituted by districts, segregation could be justified. In his opinion, Judge Allred found (pg. 1):

> That the defendant Driscoll Consolidated Independent School District's separate grouping of plaintiffs and other students of Mexican extraction, being directed at them as a class and not based on individual capacities, is arbitrary, unreasonable and unlawful; that grouping…must not be based upon racial extraction but upon individual ability to speak, understand and be instructed in the English language; that individual capacities and abilities in this respect must be determined in good faith by individual tests.

Critical and progressive scholars (McNeil, 2000; Valenzuela, 1999, 2002) contradict what is commonly believed by the broader society in the year 2004 as well as what was advocated by Judge Allred in 1957. Accountability systems that rely heavily on high-stakes testing often discriminate against Mexican American students and generate racist results in which high drop-out rates, underachievement and the elimination of Spanish fluency are often the products.

Utilizing the CRT and LatCrit Lessons

The Driscoll court case and "Robin Hood" school finance system demonstrate comparable racist results and discriminatory practices. They institute a racial hierarchy and rely on "neutral, unbiased" measures to justify inequity and racism. The Driscoll segregation policy based its operational and implementation strategy on the White

majority's assumption that the Spanish language retarded student success and that poor, migrant farmworking Mexican Americans did not possess the intellect to adequately comprehend in a regular academic track. Similarly, the current school finance system deems funding "equitable" through the institution of funding formulas although the variables, costs, and yields further exacerbate unfairness and mandate inequity. The formulas are commonly viewed as the mechanism through which fairness and equality is guaranteed.

As the analysis in Chapter 5 and qualitative data in both Chapters 4 and 5 demonstrate, the assumption that the "Robin Hood" system is "equitable" may be disputed. I, therefore, argue that only when an examination of school finance policy is conducted from a Critical Race Theory (CRT) perspective will the interests of poor, Mexican American communities be protected. In the same manner that policy analysis is conducted, a critical and visionary form of political organizing and participation must be practiced. As documented in the dissertation, my Mexican American participants did demonstrate some tenets of Latino Critical (LatCrit) Theory. However, a much more visionary and progressive embracing of LatCrit principles must be endorsed if true reform is to be accomplished via the political arena. The Driscoll case further strengthens the argument for a CRT analysis and LatCrit method and re-emphasizes that Latinos must forge more critical and strategic political alliances if they are to truly shift and influence educational policy.

I traveled to Fort Worth to find my identity. What I found in the second box of court documents legitimized the gut feeling I experienced as I viewed the Dr. Garcia documentary and reminisced about my mom's story. Listed as the plaintiff's third witness

in Volume I of the court transcripts, and first child to testify, was my mother's name, Lupe Alemán.[55] At the time, she was a 9 year-old[56] second-grader at Driscoll's elementary school and was the first of seven children to testify. As she took the oath, the judge warned her not to lie because, "If you don't tell the truth in Court, the Judge puts people in jail for that," (pg. 115). Mr. DeAnda proceeded with his questions, attempting to demonstrate to the court Lupe's command of the English language. The defense followed by trying to show that Driscoll's administrators and teachers meant no deliberate harm.

Mom knew who she was and what her experiences were even as the Court and defense attempted to persuade her to deny her experiences in this racist environment. She exhibited the kind of courage, will and critique that Mexican American political and educational leaders today would find beneficial as they argue for reform and represent their constituencies. The testimony included (pgs. 121-122):

Mr. Davis: How many different teachers have you had since you have been in school?

Ms. Alemán: Three.

Mr. Davis: Did you like them all?

Ms. Alemán: Yes, sir.

Mr. Davis: Do you think they like you?

Ms. Alemán: I don't know.

Mr. Davis: You don't know. Did they treat you nice?

[55] Testimony by Lupe Aleman is found in Hernandez, et al. vs. Driscoll CISD, Reporter's Transcript of Proceedings, Volume I, RG1, Box 162, pgs. 114-122.
[56] The trial was heard in October 1956. Mom's birthday was December 14th, so in effect she was ten-years-old when she completed the 2nd grade.

Ms. Alemán: Yes, sir.

Mr. Davis: Don't you think they really did like you?

Ms. Alemán: Yes, sir.

Mr. Davis: Do you think any of those teachers wanted to be mean to you?

Ms. Alemán: I don't know.

Mr. Davis: Well, you don't think they wanted to be mean to you, do you?

Ms. Alemán: No.

Mr. Davis: You really like them?

Mr. Davis: That's all.

The Court: You speak good English now Lupe.

Mom refused to admit to a falsehood although the defense attorney did not relent in his intimidation tactics. This child who walked into a courtroom full of White, males had no one to believe in but herself and her experiences. She understood her circumstances and relied on the only form of protest she had – she denied the question by stating, "I don't know." This is the lesson of the Driscoll case and its relevance to education policy generally and school finance policy, specifically. The lesson calls for understanding policy and political phenomenon from a critical race perspective and demonstrates a strong need to organize politically from a Latino critical perspective. It is not until Latinos and Mexican Americans, in particular, realize that their history can and should be used as a political and policy tool that the group's potential as a social justice conduit will be fully realized.

Mom continues to inspire me even today. I strive to live up to the history she left me and to emulate the courage and strength she exhibited.

APPENDIX A

Table A1

50 Poorest School Districts as Measured by the Texas School Finance System

Rank	Wealth per ADA	District	% White	% Black	% His
1	$15,353	BOLES ISD	88.3	1.4	5.9
2	**$17,628**	**SOUTH TEXAS ISD**	**18.6**	**0.5**	**75.1**
3	$22,977	SAN ELIZARIO ISD	0.8	0.3	98.9
4	**$27,471**	**EDCOUCH-ELSA ISD**	**0.5**	**0.1**	**99.3**
5	**$27,738**	**PROGRESO ISD**	**0.2**	**0**	**99.8**
6	$33,347	TORNILLO ISD	0.9	0.7	98.4
7	**$36,664**	**SANTA ROSA ISD**	**2.5**	**0.1**	**97.4**
8	**$36,868**	**MERCEDES ISD**	**1**	**0.3**	**98.8**
9	**$36,930**	**SANTA MARIA ISD**	**0**	**0**	**99.6**
10	$39,112	FABENS ISD	2.1	0.1	97.6
11	$40,958	MCLEOD ISD	94.5	3.2	1.5
12	$44,637	EDGEWOOD ISD	1.2	1.6	97
13	**$47,187**	**DONNA ISD**	**1.2**	**0.1**	**98.6**
14	$47,834	PRESIDIO ISD	1.7	0.1	98.2
15	**$49,420**	**ROBSTOWN ISD**	**1.4**	**0.6**	**97.8**
16	$50,841	SOMERSET ISD	19.8	0.8	79
17	**$51,103**	**RIO HONDO ISD**	**4.6**	**0**	**95.4**
18	$52,777	CLINT ISD	4.5	0.5	94.8
19	**$53,752**	**SAN BENITO CONS ISD**	**2.5**	**0.1**	**97.4**
20	$54,054	SOUTHWEST ISD	11.4	4.2	83.9
21	**$55,284**	**ORANGE GROVE ISD**	**41.5**	**0.7**	**57.6**

22	**$55,928**	**VALLEY VIEW ISD**	**0.1**	**0**	**99.8**
23	$56,711	POTEET ISD	16.3	0.4	83
24	**$57,594**	**BEN BOLT-PALITO BLANCO ISD**	**7.7**	**0.2**	**92.1**
25	$57,729	CRYSTAL CITY ISD	1.3	0.7	98
26	$57,836	SOUTHSIDE ISD	16.7	1.5	80.6
27	$57,850	HARLANDALE ISD	5.2	0.6	94.1
28	$58,513	ECTOR ISD	98.3	0	1.3
29	**$59,470**	**LA FERIA ISD**	**10**	**0.2**	**89.8**
30	$60,164	OLFEN ISD	41.7	3.6	54.8
31	**$61,085**	**RIO GRANDE CITY CISD**	**0.2**	**0**	**99.7**
32	**$62,302**	**MISSION CONS ISD**	**2.5**	**0.1**	**97.4**
33	$62,615	AXTELL ISD	87.5	4.9	7.1
34	$62,783	MARTINSVILLE ISD	83.9	5.4	10.8
35	**$64,027**	**LAREDO ISD**	**0.8**	**0.1**	**99.1**
36	$64,167	RICE ISD	72.1	6.5	21.4
37	$64,495	SPLENDORA ISD	88.5	0.5	10.5
38	**$64,945**	**ROMA ISD**	**0.2**	**0**	**99.3**
39	$65,742	NATALIA ISD	24.5	1	74.2
40	$66,808	GRAPE CREEK ISD	75.2	0.7	23.9
41	**$67,582**	**WESLACO ISD**	**2.5**	**0.1**	**97.1**
42	$67,605	HUBBARD ISD	71.1	23.9	4.2
43	$68,069	LA PRYOR ISD	5.2	0.5	94.3
44	$68,366	EAGLE PASS ISD	1.3	0.1	97.1
45	$68,439	MAUD ISD	92.3	7.1	0.2
46	$68,567	HAWLEY ISD	93.7	0.5	5.1
47	$69,242	CENTRAL HEIGHTS ISD	86.8	7.4	5.5
48	**$69,521**	**PHARR-SAN JUAN-ALAMO ISD**	**1.3**	**0.2**	**98.4**

49	**$69,682**	**LA VILLA ISD**	**0.3**	**0**	**99.7**
50	$69,720	SOUTH SAN ANTONIO ISD	3	1.7	94.9

Note. Data is 2002-03 school year data compiled from the Texas Education Agency, School Finance and Fiscal Analysis Division. The bolded rows indicate those districts that are located in Region One and Region Two and are members of the South Texas Association of Schools.

Table A2

50 Richest School Districts as Measured by the Texas School Finance System

Rank	Wealth per ADA	District	%White	%Black	%His
988	$913,766	TATUM ISD	56.6	23.9	19.3
989	$917,094	STERLING CITY ISD	59.6	0	40.4
990	$947,398	DIVIDE ISD	60	0	40
991	$958,621	AUSTWELL-TIVOLI ISD	29.5	0.6	69.9
992	$978,938	WHITEFACE CONS ISD	69.5	1.4	27.6
993	$997,779	HUNT ISD	73.2	0	26.3
994	$1,003,294	PLAINS ISD	45.2	0.2	54.6
995	$1,009,670	ROUND TOP-CARMINE ISD	83	8.9	6.9
996	$1,021,516	BECKVILLE ISD	75.1	14	9.4
997	$1,023,935	MATAGORDA ISD	73.4	5.1	21.5
998	$1,034,170	MCCAMEY ISD	38	0.8	60.6
999	$1,052,076	HIGHLAND PARK ISD	96.8	0.2	1.2
1000	$1,068,477	PRINGLE-MORSE CONS ISD	52.8	0	47.2
1001	$1,090,319	DENVER CITY ISD	36.4	1.5	61.5

1002	$1,104,849	CRANE ISD	42.4	2.1	54.7
1003	$1,110,687	DAWSON ISD	66.1	0	33.9
1004	**$1,119,253**	**SAN ISIDRO ISD**	**4.1**	**0**	**95.9**
1005	$1,123,704	PORT ARANSAS ISD	89.3	0.9	7.6
1006	$1,140,259	SEMINOLE ISD	55.9	2.2	41.5
1007	$1,165,711	SUDAN ISD	49.1	5.8	44.5
1008	$1,214,866	WESTBROOK ISD	73.3	3.3	22
1009	$1,244,904	EVADALE ISD	99.2	0.2	0.6
1010	$1,290,402	BUENA VISTA ISD	64	0	36
1011	$1,297,437	LOOP ISD	51.7	0	48.3
1012	$1,308,947	WINK-LOVING ISD	72	1.2	26.5
1013	$1,340,463	SUNDOWN ISD	50.6	1.3	47.6
1014	$1,365,459	RANKIN ISD	57.8	3	38.9
1015	$1,374,729	GLEN ROSE ISD	76.9	0.4	20.9
1016	$1,412,604	PLEMONS-STINNETT-PHILLIPS CISD	86.4	0.3	11
1017	$1,485,647	GLASSCOCK COUNTY ISD	61.9	0	38.1
1018	$1,515,351	CROCKETT CO CONS CSD	33.4	0.2	66.2
1019	$1,521,917	EZZELL ISD	97.1	0	2.9
1020	$1,592,147	IRAAN-SHEFFIELD ISD	52.2	2.9	44.5
1021	$1,617,679	TERRELL COUNTY ISD	36.3	0	60.2
1022	$1,637,105	BOYS RANCH ISD	78.4	6.7	12.6
1023	$1,734,658	MCMULLEN COUNTY ISD	50	0	50
1024	$1,788,924	PALO PINTO ISD	87	0	13
1025	$1,909,508	BORDEN COUNTY ISD	73.3	0	24.2
1026	**$2,018,144**	**WEBB CONS ISD**	**5.1**	**0**	**94.9**
1027	$2,096,541	GRANDVIEW-HOPKINS ISD	100	0	0
1028	$2,105,072	GUTHRIE CSD	83.5	0	16.5

1029	$2,112,646	DARROUZETT ISD	83.1	0	16.9
1030	$2,168,276	MIAMI ISD	93.6	0	5.1
1031	$2,215,169	FORT ELLIOTT CONS ISD	92.8	0	1.8
1032	**$2,930,389**	**KENEDY COUNTY WIDE CSD**	**28.2**	**0**	**71.8**
1033	$3,023,232	JAYTON-GIRARD ISD	88.4	2.1	9.6
1034	$3,103,150	SABINE PASS ISD	89.3	4	4
1035	$4,307,619	ALLISON ISD	100	0	0
1036	$4,630,192	KELTON ISD	64.7	5.9	29.4
1037	$5,046,781	DEW ISD	82.5	1.3	13.8

Note. Data is 2002-03 school year data compiled from the Texas Education Agency, School Finance and Fiscal Analysis Division. The bolded rows indicate those districts that are located in Region One and Region Two and are members of the South Texas Association of Schools.

APPENDIX B

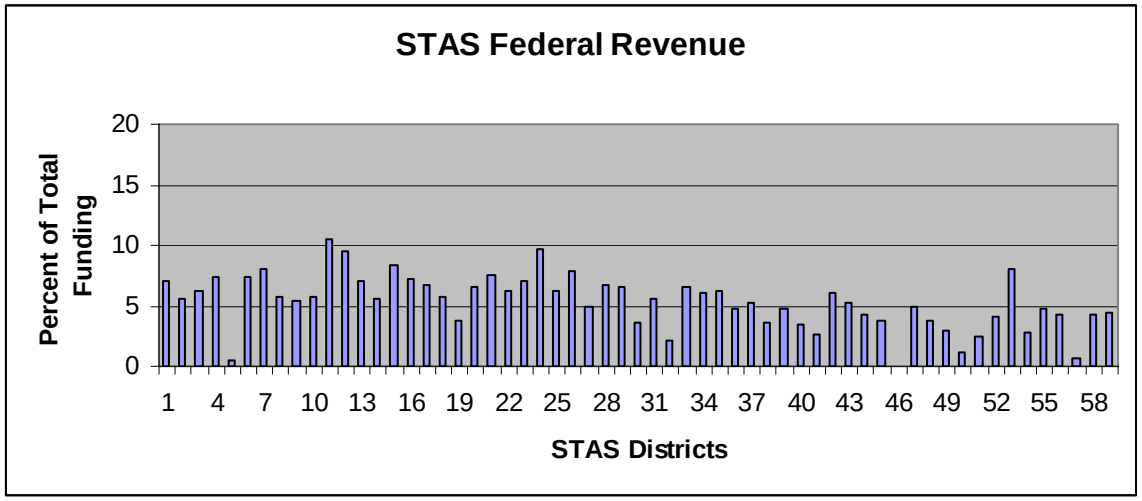

Figure B1. A distribution of South Texas Association of Schools (STAS) 2002-2003 Public Education Information System (PEIMS) financial data illustrates the minimal federal aid generated by the 59 member school districts.

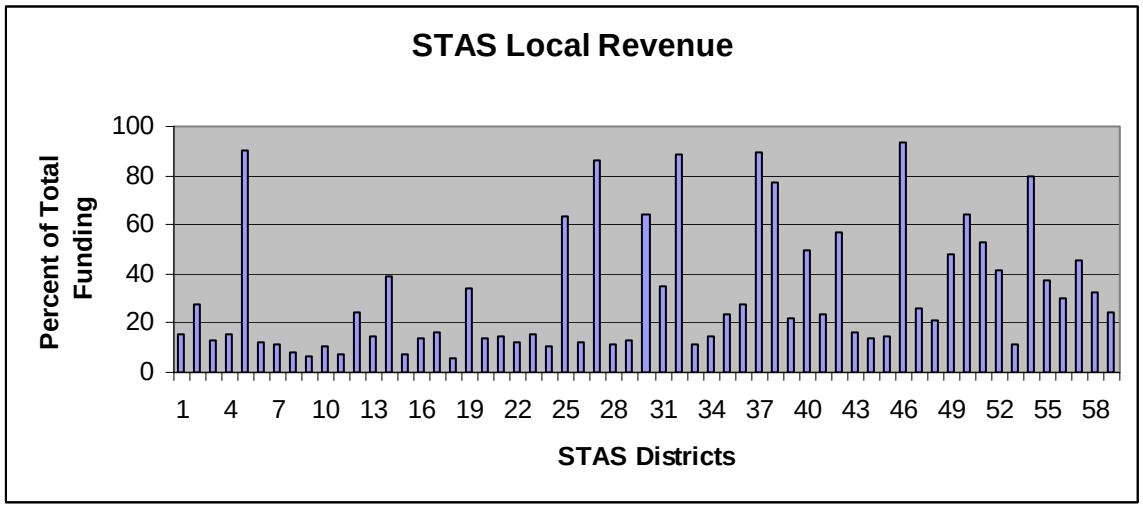

Figure B2. The percentage of local revenue generated by STAS districts is more varied, however most districts do not generate the majority of their total revenue from local funds.

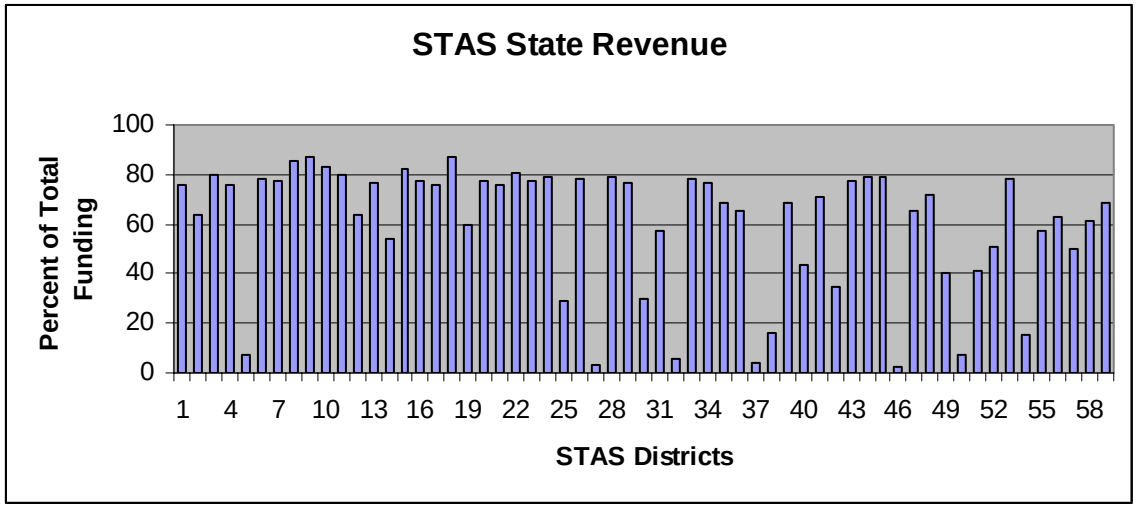

Figure B3. Member STAS districts generate the largest percentage of their total funding from state aid. Of the 59 school districts, only a handful of districts are below the 50% state revenue mark.

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